



**Purchasing Office - Bureau des achats:**

Informatics Professional Services - EL  
Division/Services professionnels en informatique  
- division EL  
Terrasses de la Chaudière 4th Floor  
10 Wellington Street  
Gatineau  
Québec  
K1A 0S5

|   |   |
|---|---|
| <b>Title - Sujet</b><br>ITSSC (Workstream 1)  |   |
| <b>Contract No. - N° du contrat</b><br>47060-187626/001/EL  | <b>Date</b><br>2018-08-29                           |
| <b>Client Reference No. - N° de référence du client</b><br>1000337626   |   |
| <b>Requisition No. - N° de la demande</b><br>47060-187626   |   |
| <b>File No. - N° de dossier</b><br>632el.47060-187626   | <b>CCC No./N° CCC - FMS No./N° VME</b>              |
| <b>Financial Code(s)</b><br><b>Code(s) financier(s)</b><br>1950-400-00  |   |
| <b>GST/HST</b><br><b>TPS/TVH</b><br><input type="checkbox"/>  |   |
| <b>F.O.B. - F.A.B.</b><br>Other - Autre Specified herein - Précisé dans les présentes                                   |   |
| <b>GST/HST - TPS/TVH</b><br>See Herein - Voir ci-inclus   | <b>Duty - Droits</b><br>See Herein - Voir ci-inclus |
| <b>Destination - of Goods, Services, and Construction:</b><br><b>Destination - des biens, services et construction:</b> |   |
| Specified Herein<br>Précisé dans les présentes  |   |
| <b>Invoices - Original and two copies to be sent to:</b><br><b>Factures - Envoyer l'original et deux copies à:</b>      |   |
| Specified Herein<br>Précisé dans les présentes  |   |
| <b>Address Enquiries to: - Adresser toutes questions à:</b><br>Lapalme, Francis   |   |
| <b>Buyer Id - Id de l'acheteur</b><br>632el   |   |
| <b>Telephone No. - N° de téléphone</b><br>(613) 858-9912 ( ) -  | <b>FAX No. - N° de FAX</b><br>( ) -                 |
| <b>Total Estimated Cost - Coût total estimatif</b><br>\$3,591,436.20  |   |
| <b>Currency Type - Devise</b><br>CAD  |   |
| <b>For the Minister - Pour le Ministre</b><br>Lapalme, Francis  |   |
| Digitally signed by Lapalme,<br>Francis<br>Date: 2018.08.29 12:03:25 -04'00'  |   |

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**CONTRACT**

**FOR**

**TASK- BASED INFORMATICS PROFESSIONAL SERVICES (TBIPS)**

**FOR**

**VARIOUS INFORMATICS PROFESSIONAL RESOURCE CATEGORIES  
(SEE HEREIN)**

**REQUESTED BY**

**THE CANADA BORDER SERVICES AGENCY (CBSA)**

**THIS DOCUMENT CONTAINS SECURITY REQUIREMENTS.**

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**List of Annexes:**

Annex A - Statement of Work

Appendix A to Annex A - Tasking Assessment Procedure

Appendix B to Annex A - Task Authorization (TA) Form

Appendix C to Annex A - Resources Assessment Criteria and Response Table

Appendix D to Annex A - Certifications at the TA stage

Annex B – Basis of Payment

Annex C - Security Requirements Check List

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## 1. Requirement

- (a) S.i. Systems Ltd. (the "Contractor") agrees to supply to the Client the services described in the Contract, including the Statement of Work, in accordance with, and at the prices set out in, the Contract. This includes providing professional services as and when requested by Canada, to one or more locations to be designated by Canada, excluding any locations in areas subject to any of the Comprehensive Land Claims Agreements.
- (b) **Client:** Under the Contract, the "Client" is Canada Border Services Agency (CBSA).
- (c) **Reorganization of Client:** The Contractor's obligation to perform the Work will not be affected by (and no additional fees will be payable as a result of) the renaming, reorganization, reconfiguration, or restructuring of any Client. The reorganization, reconfiguration and restructuring of the Client includes the privatization of the Client, its merger with another entity, or its dissolution, where that dissolution is followed by the creation of another entity or entities with mandates similar to the original Client. In connection with any form of reorganization, Canada may designate another department or government body as the Contracting Authority or Technical Authority, as required to reflect the new roles and responsibilities associated with the reorganization.
- (d) **Defined Terms:** Words and expressions defined in the General Conditions or Supplemental General Conditions and used in the Contract have the meanings given to them in the General Conditions or Supplemental General Conditions. Any reference to an Identified User in the Supply Arrangement is a reference to the Client. Also, any reference to a "deliverable" or "deliverables" includes all documentation outlined in this Contract. A reference to a "local office" of the Contractor means an office having at least one full time employee that is not a shared resource working at that location.

## 2. Task Authorization

- (a) **As-and-when-requested Task Authorizations:** The Work or a portion of the Work to be performed under the Contract will be on an "as-and-when-requested basis" using a Task Authorization (TA). The Work described in the TA must be in accordance with the scope of the Contract. The Contractor must not commence work until a validly issued TA has been issued by Canada and received by the Contractor. The Contractor acknowledges that any work performed before such issuance and receipt will be done at the Contractor's own risk.
- (b) **Allocation of Task Authorizations:** More than one contract has been awarded for this requirement. As a result, the Task Authorizations issued under this series of contracts will be allocated in accordance with the following:
  - (i) At the time this series of contracts was awarded, each contractor was allocated an amount of funding as specified in the Limitation of Expenditure based on the evaluation process described in the bid solicitation that resulted in the award of this series of contracts.
  - (ii) When a Task Authorization is issued, Canada will use a rotational method to allocate the draft Task Authorizations where the rotation is based on the ranking obtained by the Contractor during the Bid Solicitation.
  - (iii) Canada will send the first TA to the first ranked Contractor and the second TA to the second ranked Contractor. This rotational process will be repeated for each subsequent series of TAs issued by Canada.
  - (iv) The contractor sent a draft TA will have the time set out further below under the sub-paragraph entitled "Contractor's Response to Draft Task Authorization" to respond to the Contracting Authority.
  - (v) If the Contractor to whom the draft TA is first sent either fails to respond on time or confirms in writing that it refuses to perform the task, the draft TA will then be forwarded to the next-ranked Contractor. In the event that Canada determines the proposed

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resource(s) does not meet the minimum experience or other requirements of the categories identified in the draft TA, Canada may, at its entire discretion request that the Contractor propose another resource and the Contractor will have the time set out in the subparagraph "Contractor's Response to Draft Task Authorization" to respond. If the Contractor fails to respond on time or Canada determines that the proposed resource(s) does not meet the minimum experience or other requirements of the categories identified in the draft TA, the draft TA will be forwarded to the next-ranked Contractor.

- (vi) If the Contractor refuses a TA or fails to submit a valid response, the dollar value of the TA may be subtracted from the dollar value of the Contractor's Contract and may be re-allocated, at the Contracting Authority's sole discretion, in whole or in part, to the other contractors in that same Workstream.
- (vii) The process of sending out a draft TA will continue until Canada either cancels the requirement for the task or it has been validly issued to one of the contractors. If none of the contractors can perform the task (in accordance with all the terms and conditions of this series of contracts), Canada may acquire the required Work by other means.
- (viii) Any of the contractors may advise the Technical Authority and the Contracting Authority in writing that it is unable to carry out additional tasks as a result of previous commitments under one or more TAs issued under this series of contracts, and no draft TA will be sent to that contractor until that contractor has given notice in writing to the Technical Authority and the Contracting Authority that it is again available to perform additional tasks.
- (ix) If it is found that the allocation process described at part (ii) above has resulted in the award of a disproportionate dollar value of work between the Contractors, the Contractors agree that Canada, in its sole discretion, may deviate from the allocation process and issue TAs in the manner required to re-establish a proportional allocation.

(c) **Assessment of Resources Proposed at TA Stage:** Processes for issuing, responding to and assessing Task Authorizations are further detailed in Appendices A, B, C and D of Annex A.

(d) **Form and Content of draft Task Authorization:**

- (i) The Technical Authority will provide the Contractor with a description of the task in a draft Task Authorization using the form specified in Annex A.
- (ii) The draft Task Authorization will contain the details of the activities to be performed, and must also contain the following information:
  - (A) the task number;
  - (B) The date by which the Contractor's response must be received (which will appear in the draft Task Authorization, but not the issued Task Authorization);
  - (C) the categories of resources and the number required;
  - (D) a description of the work for the task outlining the activities to be performed and identifying any deliverables (such as reports);
  - (E) the start and completion dates;
  - (F) milestone dates for deliverables and payments (if applicable);
  - (G) the number of person-days of effort required;
  - (H) whether the work requires on-site activities and the location;
  - (I) the language profile of the resources required;
  - (J) the level of security clearance required of resources;
  - (K) the price payable to the Contractor for performing the task, with an indication of whether it is a firm price or a maximum TA price (and, for maximum price task authorizations, the TA must indicate how the final amount payable will be

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determined; where the TA does not indicate how the final amount payable will be determined, the amount payable is the amount, up to the maximum, that the Contractor demonstrates was actually worked on the project, by submitting time sheets filled in at the time of the work by the individual resources to support the charges); and

(L) any other constraints that might affect the completion of the task.

(e) **Contractor's Response to Draft Task Authorization:** The Contractor must provide to the Technical Authority, within 5 working days of receiving the draft Task Authorization (or within any longer time period specified in the draft TA), a quotation with the proposed total price for performing the task and a breakdown of that cost, established in accordance with the Basis of Payment specified in the Contract, as well as its corresponding proposed resource(s) in accordance with Appendix A to Annex A of the Contract. The Contractor's quotation must be based on the rates set out in the Contract. The Contractor will not be paid for preparing or providing its response or for providing other information required to prepare and validly issue the TA.

(f) **Task Authorization Limit and Authorities for Validly Issuing Task Authorizations:**

To be validly issued, a TA must include the following signatures:

(i) for any TA, inclusive of revisions, with a value less than or equal to \$250,000 (excluding Applicable Taxes), the TA must be signed by:

- (A) the Technical Authority; and
- (B) a representative from the Strategic Procurement and Material Management Division (SPMMD) of CBSA.

(ii) for any TA with a value greater than this amount, a TA must be signed by:

- (A) the Technical Authority;
- (B) a representative from the Strategic Procurement and Material Management Division (SPMMD) of CBSA; and
- (C) the Contracting Authority.

Any TA that does not bear the appropriate signature(s) is not validly issued by Canada. Any work performed by the Contractor without receiving a validly issued TA is done at the Contractor's own risk. If the Contractor receives a TA that is not appropriately signed, the Contractor must notify the Contracting Authority. By providing written notice to the Contractor, the Contracting Authority may suspend the Client's ability to issue TA's at any time, or reduce the dollar value threshold described in sub-article (i) above; any suspension or reduction notice is effective upon receipt.

(g) **Periodic Usage Reports:**

(i) The Contractor must compile and maintain records on its provision of services to the federal government under Task Authorizations validly issued under the Contract. The Contractor must provide this data to Canada in accordance with the reporting requirements detailed below. If some data is not available, the reason must be indicated. If services are not provided during a given period, the Contractor must still provide a "NIL" report. The data must be submitted on a quarterly basis to the Contracting Authority. From time to time, the Contracting Authority may also require an interim report during a reporting period.

(ii) The quarterly periods are defined as follows:

- (A) 1<sup>st</sup> quarter: April 1 to June 30;
- (B) 2<sup>nd</sup> quarter: July 1 to September 30;

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- (C) 3<sup>rd</sup> quarter: October 1 to December 31; and
- (D) 4<sup>th</sup> quarter: January 1 to March 31.

The data must be submitted to the Contracting Authority no later than 15 calendar days after the end of the reporting period.

- (iii) Each report must contain the following information for each validly issued TA (as amended):
  - (A) the Task Authorization number and the Task Authorization Revision number(s), if applicable;
  - (B) a title or a brief description of each authorized task;
  - (C) the name, Resource category and level of each resource involved in performing the TA, as applicable;
  - (D) the total estimated cost specified in the validly issued TA of each task, exclusive of Applicable Taxes;
  - (E) the total amount, exclusive of Applicable Taxes, expended to date against each authorized task;
  - (F) the start and completion date for each authorized task; and
  - (G) the active status of each authorized task, as applicable (e.g., indicate whether work is in progress or if Canada has cancelled or suspended the TA, etc.).
- (iv) Each report must also contain the following cumulative information for all the validly issued TA's (as amended):
  - (A) the amount, exclusive of Applicable Taxes, specified in the Contract (as last amended, as applicable) as Canada's total liability to the Contractor for all validly issued TA's; and
  - (B) the total amount, exclusive of Applicable Taxes, expended to date against all validly issued TA's.

(h) **Refusal of Task Authorizations or Submission of a Response which is not Valid:** The Contractor is not required to submit a response to every draft TA sent to it by Canada. However, in addition to Canada's other rights to terminate the Contract, Canada may immediately, and without further notice, terminate the Contract for default in accordance with the General Conditions if the Contractor in at least three instances has either not responded or has not submitted a valid response when sent a draft TA. For greater clarity, each draft TA, which is identifiable by its task number, will only count as one instance. A valid response is one that is submitted within the required time period and meets all requirements of the draft TA issued, including proposing the required number of resources who each meet the minimum experience and other requirements of the categories identified in the draft TA at pricing not exceeding the rates set out in Annex B.

(i) **Consolidation of TA's for Administrative Purposes:** The Contract may be amended from time to time to reflect all validly issued Task Authorizations to date, to document the Work performed under those TA's for administrative purposes.

### **3. Minimum Work Guarantee**

(a) In this clause,

- (i) **"Maximum Contract Value"** means the amount specified in the **"Limitation of Expenditure"** clause set out in the Contract; and
- (ii) **"Minimum Contract Value"** means \$20,000.00.

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(b) Canada's obligation under the Contract is to request Work in the amount of the Minimum Contract Value or, at Canada's option, to pay the Contractor at the end of the Contract in accordance with sub-article (c), subject to sub-article (d). In consideration of such obligation, the Contractor agrees to stand in readiness throughout the Contract Period to perform the Work described in the Contract. Canada's maximum liability for work performed under the Contract must not exceed the Maximum Contract Value, unless an increase is authorized in writing by the Contracting Authority.

(c) In the event that Canada does not request work in the amount of the Minimum Contract Value during the Contract Period, Canada must pay the Contractor the difference between the Minimum Contract Value and the total cost of the Work requested.

(d) Canada will have no obligation to the Contractor under this article if Canada terminates the entire Contract

- (i) for default;
- (ii) for convenience as a result of any decision or recommendation of a tribunal or court that the contract be cancelled, re-tendered or awarded to another supplier; or
- (iii) for convenience within ten business days of Contract award.

#### **4. Standard Clauses and Conditions**

All clauses and conditions identified in the Contract by number, date and title are set out in the Standard Acquisition Clauses and Conditions Manual (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.

(a) **General Conditions:**

(i) 2035 (2016-04-04), General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

With respect to Section 30 - Termination for Convenience, of General Conditions 2035, Subsection 04 is deleted and replaced with the following Subsections 04, 05 and 06:

4. The total of the amounts, to which the Contractor is entitled to be paid under this section, together with any amounts paid, due or becoming due to the Contractor must not exceed the Contract Price.
5. Where the Contracting Authority terminates the entire Contract and the Articles of Agreement include a Minimum Work Guarantee, the total amount to be paid to the Contractor under the Contract will not exceed the greater of:
  - (a) the total amount the Contractor may be paid under this section, together with any amounts paid, becoming due other than payable under the Minimum Work Guarantee, or due to the Contractor as of the date of termination, or
  - (b) the amount payable under the Minimum Work Guarantee, less any amounts paid, due or otherwise becoming due to the Contractor as of the date of termination.
6. The Contractor will have no claim for damages, compensation, loss of profit, allowance arising out of any termination notice given by Canada under this section except to the extent that this section expressly provides. The Contractor agrees to repay immediately to Canada the portion of any advance payment that is unliquidated at the date of the termination.

(b) **Supplemental General Conditions:**

The following Supplemental General Conditions:

- (i) 4002 (2010-08-16), Supplemental General Conditions - Software Development or Modification Services;
- (ii) 4007 (2010-08-16), Supplemental General Conditions - Canada to Own Intellectual Property Rights in Foreground Information;

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apply to and form part of the Contract.

## 5. Security Requirement

The following security requirements (Common PS SRCL#19 and related clauses provided by the Contract Security Program) as set out under Annex "B" to the Supply Arrangement, applies to and forms part of the Contract.

- (a) The Contractor must, at all times during the performance of the Contract, hold a valid Facility Security Clearance at the level of SECRET, issued by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC).
- (b) The Contractor personnel requiring access to PROTECTED/CLASSIFIED information, assets or sensitive work site(s) must EACH hold a valid personnel security screening at the level of SECRET, granted or approved by CISD/PWGSC.
- (c) The Contractor MUST NOT remove any PROTECTED/CLASSIFIED information from the identified work site(s), and the Contractor must ensure that its personnel are made aware of and comply with this restriction.
- (d) Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of CISD/PWGSC.
- (e) The Contractor must comply with the provisions of the:
  - (i) Security Requirements Check List and security guide (if applicable), attached at Annex C;
  - (ii) Industrial Security Manual (Latest Edition).
- (f) Additional Security Requirement
  - (i) The CBSA, will conduct its own personnel Reliability Status assessment of the Contractor (specifically the Contractor personnel), which is allowed under the Treasury Board Secretariat of Canada's (TBS) "Security and Contracting Management Standard" and the Policy on Government Security – Personnel Security Standard. Reliability Status assessment conducted by the CBSA will include a credit check.
  - (ii) If the Contractor (specifically the Contractor personnel), has already been screened under the TBS Policy on Government Security - Personnel Security Standard, the Contractor (specifically the Contractor personnel), will still undergo a security screening process to be conducted by the CBSA.
  - (iii) The credit check and fingerprinting\*, if required, will be performed by an authorized security official with the CBSA's "Personnel Security Screening Section" (PSSS), which is independent of the Public Works and Government Services Canada's (PWGSC), "Canadian and International Industrial Security Directorate" (CIISD).
  - (iv) Until the credit check, fingerprinting\* (if required) and all other security screening processes required have been completed and the Contractor (specifically the Contractor personnel) is deemed suitable by the CBSA, the Contractor (specifically the Contractor personnel) will not be permitted access to Protected / Classified information or assets, and further, will not be permitted to enter sites where such information or assets are kept.

\*Fees are applicable. Fingerprinting, if required, will be at the Bidder's cost.

## 6. Contract Period

- (a) **Contract Period:** The "Contract Period" is the entire period of time during which the Contractor is obliged to perform the Work, which includes:
  - (i) The "Initial Contract Period", which begins on September 4, 2018 and ends two years later; and

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(ii) The period during which the Contract is extended, if Canada chooses to exercise any options set out in the Contract.

(b) **Option to Extend the Contract:**

(i) The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to three additional one-year periods under the same terms and conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions set out in the Basis of Payment.

(ii) Canada may exercise this option at any time by sending a written notice to the Contractor before the expiry date of the Contract. The option may only be exercised by the Contracting Authority, and will be evidenced, for administrative purposes only, through a contract amendment.

## 7. Authorities

### (a) Contracting Authority

The Contracting Authority for the Contract is:

Name: Francis Lapalme  
Title: A/Supply Team Leader  
Organization: Public Works and Government Services Canada  
Acquisitions Branch  
Directorate: Informatics and Telecommunications Systems Procurement Directorate  
Address: 10 Wellington St., Gatineau, Québec, K1A 0S5  
Telephone: 613-858-9912  
E-mail address: [francis.lapalme@tpsgc-pwgsc.gc.ca](mailto:francis.lapalme@tpsgc-pwgsc.gc.ca)

The Contracting Authority is responsible for the management of the Contract and any changes to the Contract must be authorized in writing by the Contracting Authority. The Contractor must not perform work in excess of or outside the scope of the Contract based on verbal or written requests or instructions from anybody other than the Contracting Authority.

### (b) Technical Authority

The Technical Authority for the Contract is:

Name: Louis Albert  
Title: A/Director, Open Government and Data Analytics Division  
Organization: Canada Border Services Agency  
Address: 333 North River Rd, Ottawa, ON K1A 0L8  
Telephone: 343-291-6207  
Facsimile: 343-291-7381  
E-mail address: [louis.albert@cbsa-asfc.gc.ca](mailto:louis.albert@cbsa-asfc.gc.ca)

In his absence, the Technical Authority for the Contract is:

Name: Ali Sheikh  
Title: A/Manager, Business Analytics Competency Centre  
Organization: Canada Border Services Agency  
Address: 333 North River Rd, Ottawa, ON K1A 0L8  
Telephone: 343-291-5590  
Facsimile: 343-291-7381  
E-mail address: [ali.sheikh@cbsa-asfc.gc.ca](mailto:ali.sheikh@cbsa-asfc.gc.ca)

The Technical Authority is the representative of the department or agency for whom the Work is being carried out under the Contract and is responsible for all matters concerning the technical content of the Work under the Contract. Technical matters may be discussed with the Technical Authority; however, the Technical Authority has no authority to authorize changes to the scope of

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the Work. Changes to the scope of the Work can only be made through a contract amendment issued by the Contracting Authority.

(c) **Contractor's Representative**

Name: Brian Brady  
Title: Vice-President, Public Sector  
Organization: S.i. Systems Ltd.  
Address: 300-170 Laurier Avenue West, Ottawa, ON K1P 5V5  
Telephone: 613-786-3222  
Facsimile: 613-786-3291  
E-mail address:

**8. Proactive Disclosure of Contracts with Former Public Servants**

By providing information on its status, with respect to being a former public servant in receipt of a Public Service Superannuation Act (PSSA) pension, the Contractor has agreed that this information will be reported on departmental web sites as part of the published proactive disclosure reports, in accordance with Contracting Policy Notice: 2012-2 of the Treasury Board Secretariat of Canada.

**9. Payment**

(a) **Basis of Payment**

- (i) **Professional Services provided under a Task Authorization with a Maximum Price:** For professional services requested by Canada, in accordance with a validly issued Task Authorization, Canada will pay the Contractor, in arrears, up to the Maximum Price for the TA, for actual time worked and any resulting deliverables in accordance with the firm all-inclusive per diem rates set out in Annex B, Basis of Payment, Applicable Taxes extra. Partial days will be prorated based on actual hours worked based on a 7.5-hour workday.
- (ii) **Professional Services provided under a Task Authorization with a Firm Price:** For professional services requested by Canada, in accordance with a validly issued Task Authorization, Canada will pay the Contractor the firm price set out in the Task Authorization (based on the firm, all-inclusive per diem rates set out in Annex B), Applicable Taxes extra.
- (iii) **Travel and Living Expenses – National Joint Council Travel Directive:** The Contractor will be reimbursed its authorized travel and living expenses reasonably and properly incurred in the performance of the Work, at cost, without any allowance for profit and/or administrative overhead, in accordance with the meal and private vehicle expenses provided in Appendices B, C and D of the National Joint Council Travel Directive and with the other provisions of the directive referring to "travellers", rather than those referring to "employees". All travel must have the prior authorization of the Technical Authority. Travel requests will only be considered for a work location which is located more than 100 kilometers from the National Capital Region. The Contractor will be paid for actual time spent travelling at half the hourly rate. The hourly rate will be determined by dividing the firm per diem rate set out in Annex B by 7.5 hours. All payments are subject to government audit.
- (iv) **Competitive Award:** The Contractor acknowledges that the Contract has been awarded as a result of a competitive process. No additional charges will be allowed to compensate for errors, oversights, misconceptions or underestimates made by the Contractor when bidding for the Contract.
- (v) **Contractor's Firm Per Diem Rates:** The Contractor agrees that the rates set out in Annex B remain firm throughout the Contract Period, except as may be provided for in the express terms of the contract. In reference to Article 18(1) of SACC General Conditions 2035, the Contractor acknowledges that its obligation to provide services in

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accordance with the firm rates set out in Annex B is unaffected by the application of any existing law or any new law which may come into effect during the Contract Period.

(vi) **Professional Services Rates:** In Canada's experience, bidders from time to time propose rates at the time of bidding for one or more Resource Categories that they later refuse to honour, on the basis that these rates do not allow them to recover their own costs and/or make a profit. This denies Canada of the benefit of the awarded contract. If the Contractor does not respond or refuses to provide an individual with the qualifications described in the Contract within the time described in the Contract (or proposes instead to provide someone from an alternate category at a different rate), whether or not Canada terminates the Contract as a whole or in part or chooses to exercise any of the rights provided to it under the general conditions, Canada may impose sanctions or take other measures in accordance with the PWGSC Vendor Performance Corrective Measure Policy (or equivalent) then in effect, which measures may include an assessment that results in conditions applied against the Contractor to be fulfilled before doing further business with Canada, or full debarment of the Contractor from bidding on future requirements.

(b) **Limitation of Expenditure – Cumulative Total of all Task Authorizations**

(i) Canada's total liability to the Contractor under the Contract for all validly issued Task Authorizations (TAs), inclusive of any revisions, must not exceed the amount set out on page 1 of the Contract, less any Applicable taxes. With respect to the amount set out on page 1 of the Contract, Customs duties are excluded and Applicable Taxes are included

(ii) No increase in the total liability of Canada will be authorized or paid to the Contractor unless an increase has been approved, in writing, by the Contracting Authority.

(iii) The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:

(A) when it is 75 percent committed, or

(B) 4 months before the contract expiry date, or

(C) As soon as the Contractor considers that the sum is inadequate for the completion of the Work required in all authorized TAs, inclusive of any revisions, whichever comes first.

(i) If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority a written estimate for the additional funds required. Providing this information does not increase Canada's liability.

(c) **Method of Payment for Task Authorizations with a Maximum Price:** For each Task Authorization validly issued under the Contract that contains a maximum price:

(i) Canada will pay the Contractor no more frequently than once a month in accordance with the Basis of Payment. The Contractor must submit time sheets for each resource showing the days and hours worked to support the charges claimed in the invoice.

(ii) Once Canada has paid the maximum TA price, Canada will not be required to make any further payment, but the Contractor must complete all the work described in the TA, all of which is required to be performed for the maximum TA price. If the work described in the TA is completed in less time than anticipated, and the actual time worked (as supported by the time sheets) at the rates set out in the Contract is less than the maximum TA price, Canada is only required to pay for the time spent performing the work related to that TA.

(d) **Method of Payment for Task Authorizations with a Firm Price - Lump Sum Payment on Completion:** Canada will pay the Contractor upon completion and delivery of all the Work associated with the validly issued Task Authorization in accordance with the payment provisions of the Contract if:

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- (i) an accurate and complete invoice and any other documents required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- (ii) all such documents have been verified by Canada; and
- (iii) the Work delivered has been accepted by Canada.

**(e) Electronic Payment of Invoices – Contract**

The Contractor accepts to be paid using any of the following Electronic Payment Instrument(s):

- (i) Visa Acquisition Card;
- (ii) MasterCard Acquisition Card;
- (iii) Direct Deposit (Domestic and International);

**(f) Time Verification**

Time charged and the accuracy of the Contractor's time recording system are subject to verification by Canada, before or after payment is made to the Contractor. If verification is done after payment, the Contractor must repay any overpayment, at Canada's request.

**(g) No Responsibility to Pay for Work not performed due to Closure of Government Offices**

- (i) Where the Contractor, its employees, subcontractors, or agents are providing services on government premises under the Contract and those premises are inaccessible because of the evacuation or closure of government offices, and as a result no work is performed, Canada is not responsible for paying the Contractor for work that otherwise would have been performed if there had been no evacuation or closure.
- (ii) If, as a result of any strike or lock-out, the Contractor or its employees, subcontractors or agents cannot obtain access to government premises and, as a result, no work is performed, Canada is not responsible for paying the Contractor for work that otherwise would have been performed if the Contractor had been able to gain access to the premises

**10. Invoicing Instructions**

- (a) The Contractor must submit invoices in accordance with the information required in the General Conditions.
- (b) The Contractor's invoice must include a separate line item for each subparagraph in the Basis of Payment provision, and must show all applicable Task Authorization numbers.
- (c) By submitting invoices, the Contractor is certifying that the goods and services have been delivered and that all charges are in accordance with the Basis of Payment provision of the Contract, including any charges for work performed by subcontractors.
- (d) The Contractor must provide the original of each invoice to the Technical Authority, and a copy to the Contracting Authority.

**11. Certifications and Additional Information**

Unless specified otherwise, the continuous compliance with the certifications provided by the Contractor in its bid or precedent to contract award, any TA quotation and the ongoing cooperation in providing additional information are conditions of the Contract and failure to comply will constitute the Contractor in default. Certifications are subject to verification by Canada during the entire Contract Period.

**12. Federal Contractors Program for Employment Equity - Default by Contractor**

The Contractor understands and agrees that, when an Agreement to Implement Employment Equity (AIEE) exists between the Contractor and Employment and Social Development Canada (ESDC)-Labour, the AIEE must remain valid during the entire period of the Contract. If the AIEE becomes invalid, the

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name of the Contractor will be added to the "FCP Limited Eligibility to Bid" list. The imposition of such a sanction by ESDC will constitute the Contractor in default as per the terms of the Contract.

### **13. Applicable Laws**

The Contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario.

### **14. Priority of Documents**

If there is a discrepancy between the wording of any documents that appear on the following list, the wording of the document that first appears on the list has priority over the wording of any document that appears later on the list:

- (a) these Articles of Agreement, including any individual SACC clauses incorporated by reference in these Articles of Agreement;
- (b) Supplemental General Conditions, in the following order:
  - (i) 4002 (2010-08-16), Supplemental General Conditions - Software Development or Modification Services;
  - (ii) 4007 (2010-08-16), Supplemental General Conditions - Canada to Own Intellectual Property Rights in Foreground Information;
- (c) General Conditions 2035 (2016-04-04), Higher Complexity - Services;
- (d) Annex A, Statement of Work – Annex A including its Appendices as follows:
  - (i) Appendix A to Annex A - Tasking Assessment Procedure;
  - (ii) Appendix B to Annex A - Task Authorization (TA) Form;
  - (iii) Appendix C to Annex A - Resource Assessment Criteria and Response Table;
  - (iv) Appendix D to Annex A - Certifications at the TA stage;
- (e) Annex B, Basis of Payment;
- (f) Annex C, Security Requirements Check List;
- (g) the validly issued Task Authorizations and any required certifications (including all of their annexes, if any); and
- (h) the Contractor's bid dated June 19, 2018.

### **15. Foreign Nationals (Canadian Contractor)**

- (a) SACC Manual clause A2000C (2006-06-16) Foreign Nationals (Canadian Contractor)

### **16. Insurance Requirements**

#### **(a) Compliance with Insurance Requirements**

- (i) The Contractor must comply with the insurance requirements specified in this Article. The Contractor must maintain the required insurance coverage for the duration of the Contract. Compliance with the insurance requirements does not release the Contractor from or reduce its liability under the Contract.
- (ii) The Contractor is responsible for deciding if additional insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any additional insurance coverage is at the Contractor's expense, and for its own benefit and protection.
- (iii) The Contractor should forward to the Contracting Authority within ten (10) days after the date of award of the Contract a Certificate of Insurance evidencing the insurance

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coverage. Coverage must be placed with an Insurer licensed to carry out business in Canada and the Certificate of Insurance must confirm that the insurance policy complying with the requirements is in force. If the Certificate of Insurance has not been completed and submitted as requested, the Contracting Authority will so inform the Contractor and provide the Contractor with a time frame within which to meet the requirement. Failure to comply with the request of the Contracting Authority and meet the requirement within the time period will constitute a default under the General Conditions. The Contractor must, if requested by the Contracting Authority, forward to Canada a certified true copy of all applicable insurance policies.

(b) **Commercial General Liability Insurance**

- (i) The Contractor must obtain Commercial General Liability Insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature, but for not less than \$2,000,000 per accident or occurrence and in the annual aggregate.
- (ii) The Commercial General Liability policy must include the following:
  - (A) Additional Insured: Canada is added as an additional insured, but only with respect to liability arising out of the Contractor's performance of the Contract. The interest of Canada should read as follows: Canada, as represented by Public Works and Government Services Canada.
  - (B) Bodily Injury and Property Damage to third parties arising out of the operations of the Contractor.
  - (C) Products and Completed Operations: Coverage for bodily injury or property damage arising out of goods or products manufactured, sold, handled, or distributed by the Contractor and/or arising out of operations that have been completed by the Contractor.
  - (D) Personal Injury: While not limited to, the coverage must include Violation of Privacy, Libel and Slander, False Arrest, Detention or Imprisonment and Defamation of Character.
  - (E) Cross Liability/Separation of Insureds: Without increasing the limit of liability, the policy must protect all insured parties to the full extent of coverage provided. Further, the policy must apply to each Insured in the same manner and to the same extent as if a separate policy had been issued to each.
  - (F) Blanket Contractual Liability: The policy must, on a blanket basis or by specific reference to the Contract, extend to assumed liabilities with respect to contractual provisions.
  - (G) Employees and, if applicable, Volunteers must be included as Additional Insured.
  - (H) Employers' Liability (or confirmation that all employees are covered by Worker's compensation (WSIB) or similar program)
  - (I) Broad Form Property Damage including Completed Operations: Expands the Property Damage coverage to include certain losses that would otherwise be excluded by the standard care, custody or control exclusion found in a standard policy.
  - (J) Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of policy cancellation.
  - (K) If the policy is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.

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- (L) Owners' or Contractors' Protective Liability: Covers the damages that the Contractor becomes legally obligated to pay arising out of the operations of a subcontractor.
- (M) Advertising Injury: While not limited to, the endorsement must include coverage for piracy or misappropriation of ideas, or infringement of copyright, trademark, title or slogan.

(c) **Errors and Omissions Liability Insurance**

- (i) The Contractor must obtain Errors and Omissions Liability (a.k.a. Professional Liability) insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature but for not less than \$1,000,000 per loss and in the annual aggregate, inclusive of defence costs.
- (ii) If the Professional Liability insurance is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.
- (iii) The following endorsement must be included:

Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of cancellation.

**17. Limitation of Liability - Information Management/Information Technology**

(a) This section applies despite any other provision of the Contract and replaces the section of the general conditions entitled "Liability". Any reference in this section to damages caused by the Contractor also includes damages caused by its employees, as well as its subcontractors, agents, and representatives, and any of their employees. This section applies regardless of whether the claim is based in contract, tort, or another cause of action. The Contractor is not liable to Canada with respect to the performance of or failure to perform the Contract, except as described in this section and in any section of the Contract pre-establishing any liquidated damages. The Contractor is only liable for indirect, special or consequential damages to the extent described in this Article, even if it has been made aware of the potential for those damages.

(b) **First Party Liability:**

- (i) The Contractor is fully liable for all damages to Canada, including indirect, special or consequential damages, caused by the Contractor's performance or failure to perform the Contract that relate to:
  - (A) any infringement of intellectual property rights to the extent the Contractor breaches the section of the General Conditions entitled "Intellectual Property Infringement and Royalties";
  - (B) physical injury, including death.
- (ii) The Contractor is liable for all direct damages caused by the Contractor's performance or failure to perform the Contract affecting real or tangible personal property owned, possessed, or occupied by Canada.
- (iii) Each of the Parties is liable for all direct damages resulting from its breach of confidentiality under the Contract. Each of the Parties is also liable for all indirect, special or consequential damages in respect of its unauthorized disclosure of the other Party's trade secrets (or trade secrets of a third party provided by one Party to another under the Contract) relating to information technology.
- (iv) The Contractor is liable for all direct damages relating to any encumbrance or claim relating to any portion of the Work for which Canada has made any payment. This does not apply to encumbrances or claims relating to intellectual property rights, which are addressed under (i)(A) above.

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(v) The Contractor is also liable for any other direct damages to Canada caused by the Contractor's performance or failure to perform the Contract that relate to:

(A) any breach of the warranty obligations under the Contract, up to the total amount paid by Canada (including any applicable taxes) for the goods and services affected by the breach of warranty; and

(B) Any other direct damages, including all identifiable direct costs to Canada associated with re-procuring the Work from another party if the Contract is terminated either in whole or in part for default, up to an aggregate maximum for this subparagraph (B) of the greater of .75 times the total estimated cost (meaning the dollar amount shown on the first page of the Contract in the cell titled "Total Estimated Cost" or shown on each call-up, purchase order or other document used to order goods or services under this instrument), or \$1,000,000.00.

In any case, the total liability of the Contractor under subparagraph (v) will not exceed the total estimated cost (as defined above) for the Contract or \$1,000,000.00, whichever is more.

(vi) If Canada's records or data are harmed as a result of the Contractor's negligence or willful act, the Contractor's only liability is, at the Contractor's own expense, to restore Canada's records and data using the most recent back-up kept by Canada. Canada is responsible for maintaining an adequate back-up of its records and data.

(c) **Third Party Claims:**

(i) Regardless of whether a third party makes its claim against Canada or the Contractor, each Party agrees that it is liable for any damages that it causes to any third party in connection with the Contract as set out in a settlement agreement or as finally determined by a court of competent jurisdiction, where the court determines that the Parties are jointly and severally liable or that one Party is solely and directly liable to the third party. The amount of the liability will be the amount set out in the settlement agreement or determined by the court to have been the Party's portion of the damages to the third party. No settlement agreement is binding on a Party unless its authorized representative has approved the agreement in writing.

(ii) If Canada is required, as a result of joint and several liability or joint and solidarily liable, to pay a third party in respect of damages caused by the Contractor, the Contractor must reimburse Canada by the amount finally determined by a court of competent jurisdiction to be the Contractor's portion of the damages to the third party. However, despite Sub-article (i), with respect to special, indirect, and consequential damages of third parties covered by this Section, the Contractor is only liable for reimbursing Canada for the Contractor's portion of those damages that Canada is required by a court to pay to a third party as a result of joint and several liability that relate to the infringement of a third party's intellectual property rights; physical injury of a third party, including death; damages affecting a third party's real or tangible personal property; liens or encumbrances on any portion of the Work; or breach of confidentiality.

(iii) The Parties are only liable to one another for damages to third parties to the extent described in this Sub-article (c).

**18. Professional Services - General**

(a) The Contractor must provide professional services on request as specified in this Contract. All resources provided by the Contractor must meet the qualifications described in the Contract (including those relating to previous experience, professional designation, education, language proficiency and security clearance) and must be competent to provide the required services by any delivery dates described in the Contract.

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(b) If the Contractor fails to deliver any deliverable (excluding delivery of a specific individual) or complete any task described in the Contract on time, in addition to any other rights or remedies available to Canada under the Contract or the law, Canada may notify the Contractor of the deficiency, in which case the Contractor must submit a written plan to the Technical Authority within ten working days detailing the actions that the Contractor will undertake to remedy the deficiency. The Contractor must prepare and implement the plan at its own expense.

(c) In General Conditions 2035, the Article titled "Replacement of Specific Individuals" is deleted and the following applies instead:

#### **Replacement of Specific Individuals**

(i) If the Contractor is unable to provide the services of any specific individual identified in the Contract to perform the services, the Contractor must within five working days of having this knowledge, the individual's departure or failure to commence Work (or, if Canada has requested the replacement, within ten working days of Canada's notice of the requirement for a replacement) provide to the Contracting Authority:

(A) the name, qualifications and experience of a proposed replacement immediately available for Work; and

(B) security information on the proposed replacement as specified by Canada, if applicable.

The replacement must have qualifications and experience that meet or exceed those obtained for the original resource.

(ii) Subject to an Excusable Delay, where Canada becomes aware that a specific individual identified under the Contract to provide services has not been provided or is not performing, the Contracting Authority may elect to:

(A) exercise Canada's rights or remedies under the Contract or at law, including terminating the Contract in whole or in part for default under the Article titled "Default of the Contractor", or

(B) assess the information provided under (c) (i) above or, if it has not yet been provided, require the Contractor to propose a replacement to be rated by the Technical Authority. The replacement must have qualifications and experience that are similar or exceed those obtained for the original resource and be acceptable to Canada. Upon assessment of the replacement, Canada may accept the replacement, exercise the rights in (ii) (A) above, or require another replacement in accordance with this sub-article (c).

Where an Excusable Delay applies, Canada may require (c) (ii) (B) above instead of terminating under the "Excusable Delay" Article. An Excusable Delay does not include resource unavailability due to allocation of the resource to another Contract or project (including those for the Crown) being performed by the Contractor or any of its affiliates.

(iii) The Contractor must not, in any event, allow performance of the Work by unauthorized replacement persons. The Contracting Authority may order that an original or replacement resource stop performing the Work. In such a case, the Contractor must immediately comply with the order. The fact that the Contracting Authority does not order a resource to stop performing the Work does not relieve the Contractor from its responsibility to meet the requirements of the Contract.

(iv) The obligations in this article apply despite any changes that Canada may have made to the Client's operating environment.

#### **19. Safeguarding Electronic Media**

(a) Before using them on Canada's equipment or sending them to Canada, the Contractor must use a regularly updated product to scan electronically all electronic media used to perform the Work

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for computer viruses and other coding intended to cause malfunctions. The Contractor must notify Canada if any electronic media used for the Work are found to contain computer viruses or other coding intended to cause malfunctions.

(b) If magnetically recorded information or documentation is damaged or lost while in the Contractor's care or at any time before it is delivered to Canada in accordance with the Contract, including accidental erasure, the Contractor must immediately replace it at its own expense.

## **20. Representations and Warranties**

The Contractor made statements regarding its own and its proposed resources' experience and expertise in its bid that resulted in the award of the Contract and the issuance of TA's. The Contractor represents and warrants that all those statements are true and acknowledges that Canada relied on those statements in awarding the Contract and adding work to it through TA's. The Contractor also represents and warrants that it has, and all its resources and subcontractors that perform the Work have, and at all times during the Contract Period they will have and maintain, the skills, qualifications, expertise and experience necessary to perform and manage the Work in accordance with the Contract, and that the Contractor (and any resources or subcontractors it uses) has previously performed similar services for other customers.

## **21. Access to Canada's Property and Facilities**

Canada's property, facilities, equipment, documentation, and personnel are not automatically available to the Contractor. If the Contractor would like access to any of these, it is responsible for making a request to the Technical Authority. Unless expressly stated in the Contract, Canada has no obligation to provide any of these to the Contractor. If Canada chooses, in its discretion, to make its property, facilities, equipment, documentation or personnel available to the Contractor to perform the Work, Canada may require an adjustment to the Basis of Payment and additional security requirements may apply.

## **22. Government Property**

Canada agrees to supply the Contractor with the items listed at Article 5. Client Support of Annex A – Statement of Work. The section of the General Conditions entitled "Government Property" also applies to the use of the Government Property by the Contractor.

## **23. Transition Services**

The Contractor agrees to execute the transition tasks identified within the Task Authorizations (if applicable) and it will make all reasonable efforts to assist Canada in the transition from the incumbent to the Contractor and from the Contractor to a new contract with another supplier.

## **24. Identification Protocol Responsibilities**

The Contractor will be responsible for ensuring that each of its agents, representatives or subcontractors (hereinafter referred to as Contractor Representatives) complies with the following self-identification requirements:

- (a) Contractor Representatives who attend a Government of Canada meeting (whether internal or external to Canada's offices) must identify themselves as Contractor Representatives prior to the commencement of the meeting, to ensure that each meeting participant is aware of the fact that the individual is not an employee of the Government of Canada;
- (b) During the performance of any Work at a Government of Canada site, each Contractor Representative must be clearly identified at all times as being a Contractor Representative; and
- (c) If a Contractor Representative requires the use of the Government of Canada's e-mail system in the performance of the Work, then the individual must clearly identify him or herself as an agent or subcontractor of the Contractor in all electronic mail in the signature block as well as under "Properties." This identification protocol must also be used in all other correspondence, communication, and documentation.

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- (d) If Canada determines that the Contractor is in breach of any obligation stated in this Article, upon written notice from Canada the Contractor must submit a written action plan describing corrective measures it will implement to eliminate the recurrence of the problem. The Contractor will have five working days to deliver the action plan to the Client and the Contracting Authority, and twenty working days to rectify the underlying problem.
- (e) In addition to any other rights it has under the Contract, Canada may terminate the Contract for default if the corrective measures required of the Contractor described above are not met.

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**ANNEX A**

**STATEMENT OF WORK**

**(SEE ATTACHED DOCUMENT)**

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## **APPENDIX A TO ANNEX A** **TASKING ASSESSMENT PROCEDURE**

1. Where a requirement for a specific task is identified, a draft Task Authorization Form (TA Form) as attached at Appendix B to Annex A will be provided to the Contractor in accordance with the allocation methodology stated in the Contract Article titled "Allocation of Task Authorizations". Once a draft TA Form is received, the Contractor must submit to the Technical Authority a quotation of rates to supply the requested Resource Categories based on the information identified in the TA Form. The quotation must be signed and submitted to Canada within the time for response identified in the TA Form. The Contractor will be given a minimum of 5 business days turnaround time to submit a quotation.
2. With each quotation the Contractor must propose the required number of resources and for each proposed resource the Contractor must supply a résumé, the requested security clearance information and must complete the Response Tables at Appendix C of Annex A applicable to the Resource Categories identified in the draft TA. The same individual must not be proposed for more than one Resource Category. The résumés must demonstrate that each proposed individual meets the qualification requirements described (including any educational requirements, work experience requirements, and professional designation or membership requirements). With respect to the proposed resources:
  - (i) Proposed resources may be employees of the Contractor or employees of a subcontractor, or these individuals may be independent contractors to whom the Contractor would subcontract a portion of the Work. (Refer to Appendix D to Annex A, Certifications).
  - (ii) For educational requirements for a particular degree, designation or certificate, Canada will only consider educational programmes that were successfully completed by the resource before the date the draft TA was first issued to the Contractor.
  - (iii) For requirements relating to professional designation or membership, the resource must have the required designation or membership by the time of draft TA issuance and must continue, where applicable, to be a member in good standing of the profession or membership throughout the assessment period and Contract Period. Where the designation or membership must be demonstrated through a certification, diploma or degree, such document must be current, valid and issued by the entity specified in this Contract or if the entity is not specified, the issuer must have been an accredited or otherwise recognized body, institution or entity at the time the document was issued.
  - (iv) For work experience, Canada will not consider experience gained as part of an educational programme, except for experience gained through a formal co-operative programme at a post-secondary institution.
  - (v) For any requirements that specify a particular time period (e.g., 2 years) of work experience, Canada will disregard any information about experience if the résumé does not include the relevant dates (month and year) for the experience claimed (i.e., the start date and end date). Canada will evaluate only the duration that the resource actually worked on a project or projects (from his or her start date to end date), instead of the overall start and end date of a project or a combination of projects in which a resource has participated.
  - (vi) A résumé must not simply indicate the title of the individual's position, but must demonstrate that the resource has the required work experience by explaining the responsibilities and work performed by the individual while in that position. Only listing experience without providing any supporting data to describe responsibilities, duties and relevance to the requirement, or reusing the same wording as the TA Form, will not be considered "demonstrated" for the purposes of the assessment. The Contractor should provide complete details as to where, when, month and year, and how, through which

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activities/responsibilities, the stated qualifications / experience were obtained. In situations in which a proposed resource worked at the same time on more than one project, the duration of any overlapping time period will be counted only once toward any requirements that relate to the individual's length of experience.

3. The qualifications and experience of the proposed resources will be assessed against the requirements set out in Appendix C to Annex A to determine each proposed resource's compliance with the mandatory and rated criteria. Canada may request proof of successful completion of formal training, as well as reference information. Canada may conduct reference checks to verify the accuracy of the information provided. If reference checks are done, they will be conducted in writing by e-mail (unless the contact at the reference is only available by telephone). Canada will not assess any points or consider a mandatory criterion met unless the response is received within 5 working days. On the third working day after sending out the e-mails, if Canada has not received a response, Canada will notify the Contractor by e-mail, to allow the Contractor to contact its reference directly to ensure that it responds to Canada within 5 working days. Wherever information provided by a reference differs from the information supplied by the Contractor, the information supplied by the reference will be the information assessed. Points will not be allocated or a mandatory criteria considered as met if the reference customer is not a customer of the Contractor itself (for example, the customer cannot be the customer of an affiliate of the Contractor). Nor will points be allocated or a mandatory criteria considered as met if the customer is itself an affiliate or other entity that does not deal at arm's length with the Contractor. Crown references will be accepted.
4. During the assessment of the resources proposed, should the references for two or more resources required under that TA either be unavailable or fail to substantiate the required qualifications of the proposed resources to perform the required services, the Contracting Authority may find the quotation to be non-responsive.
5. Only quotations that meet all of the mandatory criteria will be considered for assessment of the point rated criteria. Each resource proposed must attain the required minimum score for the point rated criteria for the applicable Resource Category. If the minimum score for any proposed resource is less than what is required, the Contractor's quotation will be found to be non-responsive.
6. Once the quotation has been accepted by the Technical Authority, the TA Form will be signed by Canada and provided to the Contractor for signature. The TA Form must be appropriately signed by Canada prior to commencement of any work. The Contractor must not commence work until a validly issued TA Form (the Task Authorization) has been received, and any work performed in its absence is done at the Contractor's own risk.

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**APPENDIX B TO ANNEX A**  
**TASK AUTHORIZATION FORM**

**(SEE DOCUMENT ATTACHED)**

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**APPENDIX C TO ANNEX A**  
**RESOURCES ASSESSMENT CRITERIA AND RESPONSE TABLE**

**(SEE DOCUMENT ATTACHED)**

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## **APPENDIX D TO ANNEX A**

### **CERTIFICATIONS AT THE TA STAGE**

The following Certifications are to be used, as applicable. If they apply, they must be signed and attached to the Contractor's quotation when it is submitted to Canada.

#### **1. CERTIFICATION OF EDUCATION AND EXPERIENCE**

The Contractor certifies that all the information provided in the résumés and supporting material proposed for completing the subject work, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Contractor to be true and accurate. Furthermore, the Contractor warrants that every individual proposed by the Contractor for the requirement is capable of performing the Work described in the Task Authorization.

---

Print name of authorized individual & sign above

---

Date

#### **2. CERTIFICATION OF AVAILABILITY OF PERSONNEL**

The Contractor certifies that, should it be authorized to provide services under this Task Authorization, the persons proposed in the quotation will be available to commence performance of the work within a reasonable time from the date of issuance of the valid Task Authorization, or within the time specified in the TA Form, and will remain available to perform the work in relation to the fulfillment of the requirement.

---

Print name of authorized individual & sign above

---

Date

#### **3. CERTIFICATION OF STATUS OF PERSONNEL**

If the Contractor has proposed any individual who is not an employee of the Contractor, the Contractor certifies that it has permission from that individual to propose his/her services in relation to the Work to be performed under this TA and to submit his/her résumé to Canada. At any time during the Contract Period the Contractor must, upon request from the Contracting Authority, provide the written confirmation, signed by the individual, of the permission that was given to the Contractor of his/her availability. Failure to comply with the request may result in a default under the Contract in accordance with the General Conditions.

---

Print name of authorized individual & sign above

---

Date

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#### 4. CERTIFICATION OF LANGUAGE - English

The Contractor certifies that the proposed resource(s) in response to this draft Task Authorization is/are fluent in English. The individual(s) proposed must be able to communicate orally and in writing in English without any assistance and with minimal errors.

---

Print name of authorized individual & sign above

---

Date

#### 5. NON-DISCLOSURE AGREEMENT

I, \_\_\_\_\_ (name of proposed resource), recognize that in the course of my work as an employee or subcontractor of \_\_\_\_\_ (name of contractor), I may be given access to information by or on behalf of Canada in connection with the Work, pursuant to Contract Serial No.

\_\_\_\_\_ between Her Majesty the Queen in right of Canada, represented by the Minister of Public Works and Government Services and Canada Border Services Agency, including any information that is confidential or proprietary to third parties, and information conceived, developed or produced by the Contractor as part of the Work. For the purposes of this agreement, information includes but not limited to: any documents, instructions, guidelines, data, material, advice or any other information whether received orally, in printed form, recorded electronically, or otherwise and whether or not labeled as proprietary or sensitive, that is disclosed to a person or that a person becomes aware of during the performance of the Contract.

I agree that I will not reproduce copy, use, divulge, release or disclose, in whole or in part, in whatever way or form any information described above to any person other than a person employed by Canada on a need to know basis. I undertake to safeguard the same and take all necessary and appropriate measures, including those set out in any written or oral instructions issued by Canada, to prevent the disclosure of or access to such information in contravention of this agreement.

I also acknowledge that any information provided to the Contractor by or on behalf of Canada must be used solely for the purpose of the Contract and must remain the property of Canada or a third party, as the case may be.

I agree that the obligation of this agreement will survive the completion of the Contract Serial No.:

---

\_\_\_\_\_  
Print name of proposed resource & sign above

---

Date

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## ANNEX B

### BASIS OF PAYMENT

#### 1. Professional Services

In accordance with the Contract, the Contractor will be paid the following firm all-inclusive per diem rates for work performed pursuant to this Contract, Applicable Taxes extra.

| <b>INITIAL CONTRACT PERIOD</b><br><b>(2 YEARS)</b>    |                           |                           |
|---|---------------------------|---------------------------|
| <b>Resource Category</b>                              | <b>Level of Expertise</b> | <b>Firm Per Diem Rate</b> |
| Enterprise Resource Planning (ERP) Functional Analyst | LEVEL 2                   | -----                     |
| Enterprise Resource Planning (ERP) Functional Analyst | LEVEL 3                   | -----                     |
| Test Coordinator                                      | LEVEL 2                   | -----                     |
| Test Coordinator                                      | LEVEL 3                   | -----                     |
| Tester  | LEVEL 3                   | -----                     |
| Data Conversion Specialist                            | LEVEL 2                   | -----                     |
| Data Conversion Specialist                            | LEVEL 3                   | -----                     |
| Database Modeller / IM Modeller                       | LEVEL 3                   | -----                     |
| IM Architect  | LEVEL 3                   | -----                     |
| Technology Architect                                  | LEVEL 3                   | -----                     |
| Enterprise Architect                                  | LEVEL 3                   | -----                     |
| Business Analyst                                      | LEVEL 2                   | -----                     |
| Business Analyst                                      | LEVEL 3                   | -----                     |
| Technical Writer                                      | LEVEL 2                   | -----                     |
| Technical Writer                                      | LEVEL 3                   | -----                     |
| Project Executive                                     | LEVEL 3                   | -----                     |
| Project Coordinator                                   | LEVEL 3                   | -----                     |
| Project Manager                                       | LEVEL 2                   | -----                     |
| Project Manager                                       | LEVEL 3                   | -----                     |

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| <b>OPTION YEAR 1</b><br><b>(1 YEAR)</b>               |                           |                           |
|---|---------------------------|---------------------------|
| <b>Resource Category</b>                              | <b>Level of Expertise</b> | <b>Firm Per Diem Rate</b> |
| Enterprise Resource Planning (ERP) Functional Analyst | LEVEL 2                   |                           |
| Enterprise Resource Planning (ERP) Functional Analyst | LEVEL 3                   |                           |
| Test Coordinator                                      | LEVEL 2                   |                           |
| Test Coordinator                                      | LEVEL 3                   |                           |
| Tester  | LEVEL 3                   |                           |
| Data Conversion Specialist                            | LEVEL 2                   |                           |
| Data Conversion Specialist                            | LEVEL 3                   |                           |
| Database Modeller / IM Modeller                       | LEVEL 3                   |                           |
| IM Architect  | LEVEL 3                   |                           |
| Technology Architect                                  | LEVEL 3                   |                           |
| Enterprise Architect                                  | LEVEL 3                   |                           |
| Business Analyst                                      | LEVEL 2                   |                           |
| Business Analyst                                      | LEVEL 3                   |                           |
| Technical Writer                                      | LEVEL 2                   |                           |
| Technical Writer                                      | LEVEL 3                   |                           |
| Project Executive                                     | LEVEL 3                   |                           |
| Project Coordinator                                   | LEVEL 3                   |                           |
| Project Manager                                       | LEVEL 2                   |                           |
| Project Manager                                       | LEVEL 3                   |                           |

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| <b>OPTION YEAR 2</b><br><b>(1 YEAR)</b>               |                           |                           |
|---|---------------------------|---------------------------|
| <b>Resource Category</b>                              | <b>Level of Expertise</b> | <b>Firm Per Diem Rate</b> |
| Enterprise Resource Planning (ERP) Functional Analyst | LEVEL 2                   |                           |
| Enterprise Resource Planning (ERP) Functional Analyst | LEVEL 3                   |                           |
| Test Coordinator                                      | LEVEL 2                   |                           |
| Test Coordinator                                      | LEVEL 3                   |                           |
| Tester  | LEVEL 3                   |                           |
| Data Conversion Specialist                            | LEVEL 2                   |                           |
| Data Conversion Specialist                            | LEVEL 3                   |                           |
| Database Modeller / IM Modeller                       | LEVEL 3                   |                           |
| IM Architect  | LEVEL 3                   |                           |
| Technology Architect                                  | LEVEL 3                   |                           |
| Enterprise Architect                                  | LEVEL 3                   |                           |
| Business Analyst                                      | LEVEL 2                   |                           |
| Business Analyst                                      | LEVEL 3                   |                           |
| Technical Writer                                      | LEVEL 2                   |                           |
| Technical Writer                                      | LEVEL 3                   |                           |
| Project Executive                                     | LEVEL 3                   |                           |
| Project Coordinator                                   | LEVEL 3                   |                           |
| Project Manager                                       | LEVEL 2                   |                           |
| Project Manager                                       | LEVEL 3                   |                           |

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| <b>OPTION YEAR 3</b><br><b>(1 YEAR)</b>               |                           |                           |
|---|---------------------------|---------------------------|
| <b>Resource Category</b>                              | <b>Level of Expertise</b> | <b>Firm Per Diem Rate</b> |
| Enterprise Resource Planning (ERP) Functional Analyst | LEVEL 2                   |                           |
| Enterprise Resource Planning (ERP) Functional Analyst | LEVEL 3                   |                           |
| Test Coordinator                                      | LEVEL 2                   |                           |
| Test Coordinator                                      | LEVEL 3                   |                           |
| Tester  | LEVEL 3                   |                           |
| Data Conversion Specialist                            | LEVEL 2                   |                           |
| Data Conversion Specialist                            | LEVEL 3                   |                           |
| Database Modeller / IM Modeller                       | LEVEL 3                   |                           |
| IM Architect  | LEVEL 3                   |                           |
| Technology Architect                                  | LEVEL 3                   |                           |
| Enterprise Architect                                  | LEVEL 3                   |                           |
| Business Analyst                                      | LEVEL 2                   |                           |
| Business Analyst                                      | LEVEL 3                   |                           |
| Technical Writer                                      | LEVEL 2                   |                           |
| Technical Writer                                      | LEVEL 3                   |                           |
| Project Executive                                     | LEVEL 3                   |                           |
| Project Coordinator                                   | LEVEL 3                   |                           |
| Project Manager                                       | LEVEL 2                   |                           |
| Project Manager                                       | LEVEL 3                   |                           |

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**ANNEX C**  
**SECURITY REQUIREMENTS CHECK LIST**

**(SEE ATTACHED DOCUMENT)**

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# Annex A

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## Statement of Work

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## 1. BACKGROUND

CBSA Information, Science and Technology Branch (ISTB) has identified the need to establish a strategic IT Professional Services Supply Chain to support the Agency's Enterprise Architecture, Information Management & Common Services division's IT requirement relating to Open Government and Data Analytics in the following functional areas:

- Business Analytics Competency Centre (BACC)
- Business Intelligence and Analytics Service (BIAS)
- Business Reporting Support
- Data Services Portfolio Manager.

## 2. SCOPE OF WORK

The contractor will provide IT professional services resources to supplement and support the staff currently in place on various CBSA initiatives, and work on high performance, high availability, and mission critical national systems, built on the IT Environment identified in Section 4 below. The scope of work is in support of the following CBSA initiatives and systems:

1. Initiatives within the Agency's Enterprise Architecture, Information Management & Common Services division's mandate include but are not limited to:
  - a. Commercial Business Intelligence and Analytics
  - b. Travellers Business Intelligence and Analytics
  - c. Corporate Business Intelligence and Analytics.
2. CBSA Systems include but are not limited to:
  - a. Consolidated Management Reporting System (CMRS)
  - b. Rapid Stats
  - c. Data warehouse
  - d. Master Data Management.

The work to be performed will be on an "as and when requested" basis as initiated through the issuance of Task Authorizations. Task Authorizations may be issued for any of the following resource categories:

| Resource Category                                     | Level   |
|---|---------|
| Enterprise Resource Planning (ERP) Functional Analyst | 2 and 3 |
| Test Coordinator                                      | 2 and 3 |
| Tester  | 3       |
| Data Conversion Specialist                            | 2 and 3 |
| Database Modeller / IM Modeller                       | 3       |
| IM Architect  | 3       |
| Technology Architect                                  | 3       |
| Enterprise Architect                                  | 3       |

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|                     |         |
|---------------------|---------|
| Business Analyst    | 2 and 3 |
| Technical Writer    | 2 and 3 |
| Project Executive   | 3       |
| Project Coordinator | 3       |
| Project Manager     | 2 and 3 |

### 3. TASKS

#### **3.1 Enterprise Resource Planning (ERP) Functional Analyst (Level 2)**

Responsibilities include all of the following Baseline Tasks along with any combination of the following Additional Tasks, without limitation:

**Baseline Tasks:**

1. Develop and document ERP functional, business, or system requirements specifications.
2. Develop functional, business, or system interface or capability interaction.
3. Gather and analyze information to establish the functional needs of a system or project.

**Additional Tasks** could include but are not limited to:

4. Design methods and procedures for computer systems, and sub-systems of larger systems.
5. Develop, test and implement small computer systems, and sub-systems of larger systems.
6. Document forms, manuals, programs, data files, and procedures.

#### **3.2 Enterprise Resource Planning (ERP) Functional Analyst (Level 3)**

Responsibilities include all of the following Baseline Tasks along with any combination of the following Additional Tasks, without limitation:

**Baseline Tasks:**

1. Develop and document ERP functional, business, or system requirements specifications.
2. Develop functional, business, or system interface or capability interaction.
3. Gather and analyze information to establish the functional needs of a system or project.
4. Feasibility assessment of ERP solutions for Data Analytics.

**Additional Tasks** could include but are not limited to:

5. Design methods and procedures for computer systems, and sub-systems of larger systems.
6. Develop, test and implement small computer systems, and sub-systems of larger systems.
7. Document forms, manuals, programs, data files, and procedures.
8. Status reporting.
9. Process improvement, coaching, and mentoring teams' members and users on best practices and provide knowledge transfer.

### **3.3 Test Coordinator (level 2)**

Responsibilities include all of the following Baseline Tasks along with any combination of the following Additional Tasks, without limitation:

**Baseline Tasks:**

1. Provide advice, guidance and coordination efforts for test strategies and plans related to the Business Intelligence (BI) Reporting or Data Analytics solutions, selection of automated testing tools, and identification of resources required for the BI Reporting or Data Analytics testing.
2. Plan, organize, and schedule testing efforts for the BI reporting solutions, including the execution of user acceptance testing and functional testing in the various BI environments.

**Additional Tasks** could include but are not limited to:

3. Create and update test strategies and plans related to the BI reporting solutions.
4. Management and monitoring of test plans for all levels of testing of the BI reporting solutions.
5. Status reporting.

### **3.4 Test Coordinator (level 3)**

Responsibilities include all of the following Baseline Tasks along with any combination of the following Additional Tasks, without limitation:

**Baseline Tasks:**

1. Provide advice, guidance and coordination efforts for test strategies and plans related to the reporting or Data Analytics solutions, selection of automated testing tools, and identification of resources required for the Business Intelligence (BI) testing.
2. Prioritize testing efforts for the BI reporting solutions, including the execution of user acceptance testing and functional testing in the various BI environments.

**Additional Tasks** could include but are not limited to:

3. Create and update test strategies and plans related to the BI reporting or Data Analytics solutions.
4. Management and monitoring of test plans for all levels of testing of the BI reporting or Data Analytics solutions.
5. Supervision of testing in accordance with the plan.
6. Management of walkthroughs and reviews related to testing and implementation readiness.
7. Establishing testing procedures for BI reporting or Data Analytics solutions, integration testing and regression testing with emphasis on automating the testing procedures when possible.
8. Process improvement, coaching, and mentoring teams' members and users on best practices and provide knowledge transfer.
9. Status reporting.

### **3.5 Tester (Level 3)**

Responsibilities include all of the following Baseline Tasks along with any combination of the following Additional Tasks, without limitation:

**Baseline Tasks:**

1. Test planning and coordination related to the Business Intelligence (BI) reporting or Data Analytics solutions.
2. Execution of user acceptance testing and functional testing in the various BI environments.
3. Management and monitoring of test plans for all levels of testing related to the BI reporting or Data Analytics solutions.
4. Status reporting.
5. Coach and mentor test teams, or developers on testing methods, best practices and testing tools for BI reporting or Data Analytics solutions.

**Additional Tasks** could include but are not limited to:

6. Supervision of testing in accordance with the plan.
7. Management of walkthroughs and reviews related to testing and implementation readiness.
8. Development of test scenarios and test scripts.
9. Establishing testing procedures for BI reporting or Data Analytics solutions, integration testing and regression testing with emphasis on automating the testing procedures when possible.
10. Establishing a validation and verification capability which assumes functional and performance compliance of the BI reporting or Data Analytics solutions.
11. Reviewing source application and documentation such as business, data and system requirements and models and project planning documents.
12. Participate in workshops and client meetings.

**3.6 Data Conversion Specialist (Level 2)**

Responsibilities include all of the following Baseline Tasks along with any combination of the following Additional Tasks, without limitation:

**Baseline Tasks:**

1. Develop and implement procedures that will ensure the accuracy, completeness, and timeliness of data stored in the Integrated Data Warehouse reporting environment.
2. Analyze and coordinate source database(s) into the Integrated Data Warehouse reporting environment.
3. Complete mapping, interfaces, mock conversion work, enhancements, and verify completeness and accuracy of converted data.

**Additional Tasks** could include but are not limited to:

4. Finalize conversion strategy.
5. Assess data dictionaries.
6. Advise programmers, analysts, and users about the efficient use of data.
7. Work closely with the source system designers or developers to coordinate the source system data extraction processes.
8. Work closely with the data warehouse and data marts modellers and administrators to coordinate data into the Integrated Data Warehouse reporting environment.
9. Identify opportunities for data quality improvement.

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### **3.7 Data Conversion Specialist (Level 3)**

Responsibilities include all of the following Baseline Tasks along with any combination of the following Additional Tasks, without limitation:

**Baseline Tasks:**

1. Develop and implement procedures that will ensure the accuracy, completeness, and timeliness of data stored in the Integrated Data Warehouse reporting environment.
2. Analyze and coordinate source database(s) into the Integrated Data Warehouse reporting environment.
3. Develop and implement security procedures for the database, including access and user account management.
4. Complete mapping, interfaces, mock conversion work, enhancements, and verify completeness and accuracy of converted data.

**Additional Tasks** could include but are not limited to:

5. Finalize conversion strategy.
6. Assess data dictionaries.
7. Advise programmers, analysts, and users about the efficient use of data.
8. Work closely with the source system designers or developers to coordinate the source system data extraction processes.
9. Work closely with the data warehouse and data marts modellers and administrators to coordinate data into the Integrated Data Warehouse reporting environment.
10. Identify opportunities for data quality improvement.
11. Status reporting.
12. Process improvement, coaching, and mentoring teams' members and users on best practices and provide knowledge transfer.

### **3.8 Database Modeller / IM Modeller (Level 3)**

Responsibilities include all of the following Baseline Tasks along with any combination of the following Additional Tasks, without limitation:

**Baseline Tasks:**

1. Develop and maintain the Architecture and Data Models for corporate and project specific initiatives, including the identification of data most valuable to the department, the integration of this data, and the development of core relating data models. The resulting data models will be based on data architecture and modeling design principles and tenets.
2. Development of data modeling and metadata policies and procedures in support of enterprise and Integrated Data Warehouse.
3. Analyze and evaluate alternative data architecture solutions to meet business requirements to be incorporated into the corporate data architecture.
4. Development of Business Intelligence, Integrated Data Warehouse data models for the purposes of BI, client Self-Serve BI and Data Analytics.

**Additional Tasks** could include but are not limited to:

5. Design, develop and maintain Data Models.

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- 6. Analyze proposed changes to databases from the context of the Data Model.
- 7. Provide technical expertise in the use and optimization of data modeling techniques to team members.
- 8. Provide technical assistance, guidance and direction in terms of data analysis and modeling to team members.
- 9. Provide assistance to project team and business users relating to data issues and data analysis concepts.
- 10. Data analysis as a result of new or updated technical and business requirements.
- 11. Apply approved changes to Data Models.
- 12. Conform to corporate data architectures, World Customs Organization data standards, strategies and frameworks, including enterprise data warehouse activities.
- 13. Review corporate architecture strategies and directions, data requirements, and business information needs and devise data structures to support them.
- 14. Improve modeling efficiency through tools and technologies and process recommendations to better utilize current metadata repositories.
- 15. Conform to corporate repository metadata standards and directions.
- 16. Provide input to refinement of data architectures.
- 17. Participate in data architecture refinement.
- 18. Define access strategies.
- 19. Construct, monitor and report on work plans and schedules.

### **3.9 IM Architect (Level 3)**

Responsibilities include all of the following Baseline Tasks along with any combination of the following Additional Tasks, without limitation:

**Baseline Tasks:**

- 1. Analyze existing capabilities and requirements, develop redesigned frameworks and recommend areas to meet business and technical requirements for improved capability and integration in Business Intelligence (BI) reporting or Data Analytics environments.
- 2. Evaluate existing procedures and methods, identify and document database content, structure, and application subsystems, and develop data dictionary for BI reporting or Data Analytics solutions.
- 3. Define and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing BI reporting or Data Analytics systems.
- 4. Development of Information Architecture for the purposes of BI, client Self-Serve BI and Analytics, for platform inter-operability between data and technology, and conformity with world customs organizational standards and practices.

**Additional Tasks** could include but are not limited to:

- 5. Develop and document detailed statements of requirements for business intelligence or Data Analytics solutions.
- 6. Provide support in the development of data governance artefacts.
- 7. Prototype potential solutions, provide tradeoff information and suggest recommended courses of action in support of enterprise and Integrated Data Warehouse.

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- 8. Perform information modelling in support of Business Process Reengineering (BPR) implementations of Business Intelligence or Data Analytics solutions.
- 9. Maintain, and evolve data and technology roadmaps for planned evolution, compatibility and interoperability of Business Intelligence and Data Analytics capabilities.
- 10. Perform cost/benefit analysis of implementing new processes and solutions in a BI reporting, or Data Analytics environment.
- 11. Provide advice in developing and integrating process and information models between business processes to eliminate information and process redundancies in a BI reporting or Data Analytics environment.
- 12. Provide advice in defining new requirements and opportunities for applying efficient and effective solutions; identify and provide preliminary costs of potential options for BI reporting and Data Analytics solutions.

### **3.10 Technology Architect (Level 3)**

Responsibilities include all of the following Baseline Tasks along with any combination of the following Additional Tasks, without limitation:

#### **Baseline Tasks:**

- 1. Develop technical architectures, frameworks and strategies, either for an organization or for a major application area, to meet the business and application requirements.
- 2. Identify the policies and requirements that drive out a particular solution in support of enterprise and Integrated Data Warehouse.
- 3. Review application and program design or technical infrastructure design to ensure adherence to standards and to recommend performance improvements.
- 4. Development of Technology Architecture for the purposes of BI, client Self-Serve BI and Analytics.
- 5. Adoption strategies and migration path to cloud solutions, technology change management, business continuity planning of business intelligence and Data Analytics services.

#### **Additional Tasks could include but are not limited to:**

- 6. Analyze and evaluate alternative technology solutions to meet business problems.
- 7. Ensures the integration of all aspects of technology solutions.
- 8. Monitor industry trends to ensure that solutions fit with government and industry directions for technology.
- 9. Provide information, direction and support for emerging technologies.
- 10. Perform impact analysis of technology changes.
- 11. Provide support to applications or technical support teams in the proper application of existing infrastructure.

### **3.11 Enterprise Architect (Level 3)**

Responsibilities include all of the following Baseline Tasks along with any combination of the following Additional Tasks, without limitation:

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**Baseline Tasks:**

1. Evaluate the enterprise's business, Information and Communications Technology (ICT) architecture, determine its consistency and integration with the organization's business, ICT strategies, assess the degree of its alignment with Treasury Board Chief Information Officer (CIO) Business Transformation Enablement Program (BTEP) and Federated Architecture Program (FAP) and recommend changes to the business, ICT architecture to improve its alignment with these external factors.
2. Identify future business, ICT requirements against the current enterprise architecture, perform gaps analyses, develop requirements for Information Technology Architectures and prepare migration strategies.
3. Assess the feasibility of migrating from the current state to the target business architecture and enabling technologies and identify the risks associated with migrating to the target business architecture and technologies and make recommendations for risk mitigation.
4. Development of Enterprise Architecture for data and technology, for the purposes of BI, client Self-Serve BI and Data Analytics, with focus on data and technology inter-operability, compatibility with world customs organizations.

**Additional Tasks** could include but are not limited to:

5. Identify the policies and requirements that drive out a particular solution in support of enterprise and Integrated Data Warehouse.
6. Identify business and technology trends that create opportunities for business improvement, advise business and ICT Senior Executives on ICT trends and emerging technologies and the impact on the organization's and government ICT architectures and business strategies, model "What if" scenarios and recommend appropriate changes to the existing architecture and ICT infrastructure, and recommend alternative solutions, methodologies and strategies.
7. Produce an architectural evolution plan, recommend prioritization of architecture evolution initiatives, and develop or implement an architecture evolution plan.
8. Manage the development and implementation of an architectural improvement plan.
9. Coach, mentor, train and knowledge transfer to facilitate organizational onboarding of architecture designs and solutions.

**3.12 Business Analyst (Level 2)**

Responsibilities include all of the following Baseline Tasks along with any combination of the following Additional Tasks, without limitation:

**Baseline Tasks:**

1. Perform business analyses of functional requirements to identify information, procedures, and decision flows for Business Intelligence (BI) reporting or Data Analytics solutions.
2. Define and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems BI reporting and Data Analytics solutions.
3. Consulting and collaborating with various stakeholders.
4. Development of Business Analysis for the purposes of BI, client Self-Serve BI and Analytics.

Additional Tasks could include but are not limited to:

5. Support in defining input and output sources, including detailed plan for technical design phase, and obtain approval of the BI reporting or Data Analytics system proposal.
6. Developing BI reporting application requirements for an Integrated Data Warehouse.
7. Develop and document statements of requirements for considered BI reporting or Data Analytics alternatives.
8. Evaluate existing procedures and methods, identify and document items such as database content, structure and application subsystems for BI reporting or Data Analytics solutions.
9. Define and document various user support artifacts for BI reporting or Data Analytics solutions.
10. Establish acceptance test criteria with client for BI reporting or Data Analytics initiatives.
11. Support and use the selected departmental methodologies.
12. Interpreting commercial and traveler government policy legislation and regulation.
13. Interpreting immigration and enforcement government policy legislation and regulation.
14. Interpreting financial government policy legislation and regulation.

### **3.13 Business Analyst (Level 3)**

Responsibilities include all of the following Baseline Tasks along with any combination of the following Additional Tasks, without limitation:

Baseline Tasks:

1. Perform business analyses of functional requirements to identify information, procedures, and decision flows for Business Intelligence (BI) reporting or Data Analytics solutions.
2. Define and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems BI reporting and Data Analytics solutions.
3. Consulting and collaborating with various stakeholders.
4. Status reporting.
5. Process improvement, coaching, and mentoring teams' members and users on best practices and provide knowledge transfer.
6. Development of Business Analysis for the purposes of BI, client Self-Serve BI and Analytics.

Additional Tasks could include but are not limited to:

7. Recommend industry trends to ensure that BI reporting or Data Analytics solutions fit with government and industry directions for technology.
8. Support in defining input and output sources, including detailed plan for technical design phase, and obtain approval of the BI reporting or Data Analytics system proposal.
9. Developing BI Reporting Application Requirements for an Integrated Data Warehouse.
10. Develop and document statements of requirements for considered BI reporting or Data Analytics alternatives.
11. Evaluate existing procedures and methods, identify and document items such as database content, structure, and application subsystems for BI reporting or Data Analytics solutions.
12. Define and document various user support artifacts for BI reporting or Data Analytics solutions.
13. Establish acceptance test criteria with client for BI reporting or Data Analytics initiatives.
14. Support and use the selected departmental methodologies.
15. Interpreting commercial and traveler government policy legislation and regulation.
16. Interpreting immigration and enforcement government policy legislation and regulation.

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17. Interpreting financial government policy legislation and regulation.

### **3.14 Technical Writer (Level 2)**

Responsibilities include all of the following Baseline Tasks along with any combination of the following Additional Tasks, without limitation:

**Baseline Tasks:**

1. Document help text, user manuals, technical documentation, web page content, etc.
2. Investigate the accuracy of the information collected by making direct use of the material being documented.
3. Modify, validate and compile technical documents such as technical publications in general and system data lists and drawings.

**Additional Tasks** could include but are not limited to:

4. Gather information concerning the features and functions provided by the developers.
5. Assess the audience for the documents or manuals which are required and prepare a statement of purpose and scope for each.
6. Design the layout of the documents or manuals.
7. Plan, research and write technical architecture artifacts, and specifications.
8. Assist and participate in meetings; this includes writing meeting minutes.
9. Review documents, drawings and associated data for conformance to established standards.

### **3.15 Technical Writer (Level 3)**

Responsibilities include all of the following Baseline Tasks along with any combination of the following Additional Tasks, without limitation:

**Baseline Tasks:**

1. Document help text, user manuals, technical documentation, web page content, etc.
2. Investigate the accuracy of the information collected by making direct use of the material being documented.
3. Modify, validate and compile technical documents such as technical publications in general and system data lists and drawings.

**Additional Tasks** could include but are not limited to:

4. Determine documentation requirements and makes plans for meeting them.
5. Gather information concerning the features and functions provided by the developers.
6. Assess the audience for the documents or manuals which are required and prepare a statement of purpose and scope for each.
7. Design the layout of the documents or manuals.
8. Plan, research and write technical architecture artifacts, and specifications.
9. Assist and participate in meetings; this includes writing meeting minutes.
10. Review documents, drawings and associated data for conformance to established standards
11. Status reporting.
12. Process improvement, coaching, and mentoring teams' members and users on best practices and provide knowledge transfer.

### **3.16 Project Executive (Level 3)**

Responsibilities include all of the following Baseline Tasks along with any combination of the following Additional Tasks, without limitation:

#### **Baseline Tasks:**

1. Define and confirm the objectives for the project, determine budgetary requirements, the composition, roles and responsibilities and terms of reference for the project team.
2. Develop or review or analyze Project Charters, Business Cases, detailed project plans, Memorandums to Cabinet, or Treasury Board submissions.
3. Lead the development of briefings, solutions and status reports for presentation to executive management.
4. Develop and deliver presentations to senior management and stakeholder groups as required, including the preparation of plans, charts, tables and diagrams to assist in analyzing or displaying problems.
5. Provide leadership and oversight for the design activities, including usage of deliverables necessary to satisfy the methodology, including, but not limited to:
  - Strategic Business Objectives and Critical Success Factors.
  - Definition of business competencies, capabilities, value drivers, outcomes and measures.
  - Definition of target business model, operating model, and target service model.
  - Definition and development of strategy and value components such as strategy maps, competency maps, value maps, value clusters, goal chains and value chain diagrams.
  - Identification and analysis of pain points, pain clusters and pain chains.
6. Formulate statements of problems; establishes procedures for the development and implementation of significant, new or modified project elements to solve these problems, and obtains approval thereof.

#### **Additional Tasks could include but are not limited to:**

7. Oversee and provide guidance to several Project Managers, each responsible for an element of the project and its associated project team.
8. Provide requirements management and control throughout the project.
9. Provide advice to ensure business strategies are developed and implemented; project schedules are developed, maintained and respected; risks and issues are managed; and change request procedures are followed.
10. Provide guidance and recommendations for the design, development, test, and implementation.
11. Meet with other organizational executives to ensure all internal and external stakeholders are committed and moving forward on project and organizational goals.
12. Manage internal and external stakeholder relations.
13. Lead working groups and consultations and obtain consensus and reach decisions with respect to recommendations and strategic options pertaining to the project.
14. Coordinate the efforts of multiple stakeholders to support delivering a portfolio approach to project management.
15. Provide expert solution and business transformation leadership for the project with all stakeholders.
16. Ensure compliance with portfolio-wide standards for architecture, engineering and business transformation.

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- 17. Support release planning from an architecture perspective, including requirements, and associated planning and execution of work to support identified requirements.
- 18. Provide solution and transformation alignment leadership from a project planning perspective.
- 19. Support the development of the transformation roadmap and transition plan.
- 20. Report progress of the project on an ongoing basis and at scheduled points in the life cycle.
- 21. Review and comment on all project deliverables from initiation to project completion.
- 22. Manage scope, context and business requirements, working with departmental leads and key clients.
- 23. Provide project oversight during the development, implementation and operations start-up to ensure that resources are made available and that the project is developed and is fully operational within previously agreed time, cost and performance parameters.
- 24. Public Safety sector stakeholder coordination.

### **3.17 Project Coordinator (Level 3)**

Responsibilities include all of the following Baseline Tasks along with any combination of the following Additional Tasks, without limitation:

#### **Baseline Tasks:**

- 1. Provide administrative and technical support of a clerical nature as required to a project team.
- 2. Monitoring, control and maintenance of project documentation and application libraries.
- 3. Communications management with project management, IT delivery teams and end users on administrative matters related to the project.
- 4. Project coordination of initiatives with specific emphasis on BI, client Self-Serve BI and Analytics projects, and change initiatives.

#### **Additional Tasks could include but are not limited to:**

- 5. Monitoring and control of project execution, IT delivery teams and end users in project coordination and synchronization tasks.
- 6. Participate at project meetings to capture outcomes and action items.
- 7. Track project change requests.
- 8. Maintain and updates relevant project information in manual or electronic files; project information might include such things as project activity schedule, status reports, correspondence.
- 9. Use computer tools, aids, system control languages on PCs, minis, or mainframes to perform work.

### **3.18 Project Manager (Level 2)**

Responsibilities include all of the following Baseline Tasks along with any combination of the following Additional Tasks, without limitation:

#### **Baseline Tasks:**

- 1. Manage Business Intelligence (BI) or Data Analytics projects during the development, implementation and operations startup by ensuring that resources are made available and that the project is developed and is fully operational within previously agreed time, cost and performance parameters.

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- 2. Prepare plans, charts, tables and diagrams to assist in analyzing or displaying progress, issues, risks, or problems; work with a variety of project management tools.
- 3. Maintain process improvement including lessons learned, communication and change management throughout the full lifecycle of BI or Data Analytics project delivery.
- 4. Project management of initiatives in support of BI, client Self-Serve BI and Analytics.

Additional Tasks could include but are not limited to:

- 5. Formulate statements of problems; establishes procedures for the development and implementation of significant, new or modified project elements to solve these problems, and obtains approval thereof.
- 6. Report progress of BI or Data Analytics projects on an ongoing basis and at scheduled points in the life cycle.
- 7. Meet in conference with stakeholders and other project managers and states problems in a form capable of being solved.
- 8. Develop presentations and reports to communicate progress of projects within the assigned portfolio.
- 9. Public Safety sector stakeholder coordination.

### **3.19 Project Manager (Level 3)**

Responsibilities include all of the following Baseline Tasks along with any combination of the following Additional Tasks, without limitation:

Baseline Tasks:

- 1. Manage Business intelligence or Data Analytics projects during the development, implementation and operations startup by ensuring that resources are made available and that the project is developed and is fully operational within previously agreed time, cost and performance parameters.
- 2. Prepare and validate TBS grade dashboards, plans, charts, tables and diagrams to assist in analyzing or displaying problems; work with a variety of project management tools. Includes managing risk and issue logs in support of project communications management, governance and change management.
- 3. Maintain process improvement including lessons learned, communication and change management throughout the full lifecycle of the Business Intelligence (BI) or Data Analytics project delivery.
- 4. Project management of initiatives in support of BI, client Self-Serve BI and Analytics.

Additional Tasks could include but are not limited to:

- 5. Formulate statements of problems; establishes procedures for the development and implementation of significant, new or modified project elements to solve these problems, and obtains approval thereof.
- 6. Define and document the objectives for BI or Data Analytics projects, including project charters, plans, financial management, risk and issue management, projected and actual expenditures financial monitoring.
- 7. Report progress of BI or Data Analytics projects on an ongoing basis and at scheduled points in the life cycle.

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8. Meet in conference with stakeholders and other project managers and states problems in a form capable of being solved.
9. Coaching, and mentoring teams' members and users on best practices and provide knowledge transfer.
10. Develop presentations and reports to communicate progress of projects within the assigned portfolio.
11. Public Safety sector stakeholder coordination.

#### **4. TECHNICAL ENVIRONMENT**

1. IBM DB2 on UNIX
2. IBM PureData
3. IBM InfoSphere Suite
4. IBM InfoSphere Change Data Capture
5. IBM InfoSphere Data Architect
6. IBM SPSS
7. IBM SPSS Modeler Server
8. IBM Cognos Framework Manager
9. IBM Cognos Business Intelligence Transformer
10. IBM Cognos Administration
11. IBM Cognos PowerPlay Studio
12. IBM Cognos Software Development Kit
13. SQL
14. Sybase
15. XML
16. R
17. Python
18. ArcGIS
19. MS Office.

#### **5. CLIENT SUPPORT**

The CBSA Data Management team will provide an appropriate workspace with access to the appropriate tools for the resources to carry out the expectations set out in this SOW.

The contractor will be provided with a CBSA user ID, password, workstation or laptop, email address, and other materials (supporting documentation) as required in order to process, store, or transmit CBSA data on the CBSA network during the contract. The use of contractor IT systems is not permitted.

#### **6. DELIVERABLES**

The Contractor will provide various reports, plans, analysis and other related documents as specified in the applicable Task Authorization. All deliverables are to be submitted in English and as described in each Task Authorization.

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## **7. CONSTRAINTS**

At no time and in no way is CBSA data to be removed from CBSA sites, nor will access to or from the contractor's IT systems through the use of a session (e.g VPN) be permitted.

The Contractor must comply with CBSA internal security policies, directives, standards, and guidelines at all times during the contract.

## **8. REPORTING REQUIREMENTS**

Timesheets are to be provided monthly depicting hours worked on a daily basis.

## **9. WORK LOCATION**

All work will be performed in the National Capital Region on-site at CBSA offices.

The current Primary Office location is 333 North River Rd Ottawa, Ontario.

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## GLOSSARY

| <b>Acronym or Term</b>                     | <b>Definition</b>   |
|--|---|
| Business Cases                             | A presentation or a proposal to an authority by an organization seeking funding, approval, or both for an activity, initiative, or project. A business case puts a proposed investment decision into a strategic context and provides the information necessary to make an informed decision about whether to proceed with the investment and in what form. |
| Business Intelligence                      | The strategies and technologies used by enterprises for the data analysis of business information. BI technologies provide historical, current and predictive views of business operations.   |
| Business Process Reengineering             | A business management strategy focusing on the analysis and design of workflows and business processes within an organization.  |
| Business Transformation Enablement Program | A set of tools which have been developed to provide an integrated approach for strategic management and alignment, and business transformation.   |
| Critical Success Factors                   | A management term for an element that is necessary for an organization or project to achieve its mission.   |
| Data Analytics                             | The process of examining data sets in order to draw conclusions about the information they contain.   |
| Architecture and Data Model                | An abstract model that organizes elements of data and standardizes how they relate to one another and to properties of the real world entities.   |
| Data Policy                                | A set of measurable rules for a set of data elements, in the context of an organizational scope, for the benefit of a business process, irrespective of where the data is stored and the party that provides the data.  |
| Data Base Management System                | A software package designed to define, manipulate, retrieve and manage data in a database.  |
| Extract, Load, Transform                   | A data integration process for transferring raw data from source systems to a target database and then preparing the information for downstream uses.   |
| Federated Architecture Program             | A pattern in enterprise architecture that allows interoperability and information sharing between semi-autonomous de-centrally organized lines of business (LOBs), information technology systems and applications.   |
| Guiding Principles                         | Principles or precepts that guide an organization throughout its life in all circumstances, irrespective of changes in its goals, strategies, type of work, or the top management.  |
| Information and Communications Technology  | A term for information technology (IT) which stresses the role of unified communications[1] and the integration of telecommunications (telephone lines and wireless signals), computers as well as necessary enterprise software, middleware, storage, and audio-visual systems, which enable users to access, store, transmit, and manipulate information. |
| Information Architecture                   | The structural design of shared information environments; the art and science of organizing and labelling websites, intranets, online communities and software to support usability and findability; and an emerging  |

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|                                      |   |
|--------------------------------------|---|
|                                      | community of practice focused on bringing principles of design and architecture to the digital landscape.   |
| Information Technology Architectures | The process of development of methodical information technology specifications, models and guidelines, using a variety of Information Technology notations, for example UML, within a coherent Information Technology architecture framework, following formal and informal Information Technology solution, enterprise, and infrastructure architecture processes.   |
| Integrated Data Warehouse            | A unified database that holds all the business information of an organization and makes it accessible all across the organization.  |
| Memorandum to Cabinet                | A minister's vehicle for proposing and explaining a proposed measure to the Cabinet and for obtaining its approval.   |
| Metadata Repository                  | A database created to store metadata. Metadata is information about the structures that contain the actual data. Metadata is often said to be "data about data", but this is misleading. Data profiles are an example of actual "data about data". Metadata is one layer of abstraction removed from this – it is data about the structures that contain data. Metadata may describe the structure of any data, of any subject, stored in any format. |
| Project Charters                     | A statement of the scope, objectives, and participants in a project. It provides a preliminary delineation of roles and responsibilities, outlines the project objectives, identifies the main stakeholders, and defines the authority of the project manager.  |
| Prototypes                           | An original or first model from which other forms are copied or developed.  |
| Self-Serve BI and Analytics          | An approach to data analytics that enables business users to access and work with corporate data even though they do not have a background in statistical analysis, business intelligence (BI) or data mining.<br><br>Self-Service Analytics is an approach to advanced analytics that allows business users to manipulate data to spot business opportunities, without requiring them to have a background in statistics or technology.              |
| Strategic Business Objectives        | Goals deemed most important to the current and future health of an organization.  |
| Technology Architecture              | The process of development of methodical information technology specifications, models and guidelines, using a variety of Information Technology notations, for example UML, within a coherent Information Technology architecture framework, following formal and informal Information Technology solution, enterprise, and infrastructure architecture processes.   |
| World Customs Organization           | The World Customs Organization (WCO), established in 1952 as the Customs Co-operation Council (CCC) is an independent intergovernmental body whose mission is to enhance the effectiveness and efficiency of Customs administrations.<br><a href="http://www.wcoomd.org/">http://www.wcoomd.org/</a>  |



## TASK AUTHORIZATION FORM FORMULAIRE D'AUTORISATION DE TÂCHES

### **PART 1** (completed by the Technical/Project Authority) / **PARTIE 1** (complété par le Responsable technique / Chargé du projet)

| <b>A. General Information / Informations générales</b>               |                           |                                      |                                       |   |
|--|---------------------------|--------------------------------------|---------------------------------------|---|
| Contract Number / Numéro du contrat :                                |                           |                                      |                                       |   |
| Contractor Name / Nom du Contracteur :                               |                           |                                      |                                       |   |
| Task Authorization (TA) No.<br>Nº de l'autorisation de tâches (AT) : | STOT No.<br>Nº de l'EDT : | Financial Coding<br>Code financier : | Date of Issuance<br>Date d'émission : | Response required by<br>Réponse requise<br>d'ici le : |
|  |                           |                                      |                                       |   |

| <b>B. For Amendments Only / Aux fins de modification seulement</b> |  |  |  |  |
|--|--|--|--|--|
| Amendment No. / N° de la modification :                            |  |  |  |  |
| Reason for the Amendment / Raison pour la modification :           |  |  |  |  |

| <b>C. TA Requirements / Exigences relatives à l'AT</b>  |  |   |  |  |
|---|--|---|--|--|
| Required Resource(s) / Ressource(s) requise(s)  |  |   |  |  |
| Category and Level<br>Catégorie et Niveau   | Estimated Level of Effort (days) / Niveau d'effort estimatif (jours) | Linguistic Profile / Profile linguistique | Required Level(s) of Security / Niveau(x) de sécurité requis |  |
|   |  |   |  |  |
| Statement of Work (tasks, deliverables, reports, etc.) / Énoncé des travaux (tâches, livrables, rapports, etc.) |  |   |  |  |
| See attached / Voir pièce jointe  |  |   |  |  |

| <b>Period of Services / Période de service:</b>  |   |   |  |  |
|--|---|---|--|--|
| Initial Start Date / Date de début initiale :  |   | Initial End Date / Date de fin initiale : |  |  |
| Extended End Date (See Reason for the Amendment) / Date de fin prolongée (voir Raison pour la modification): |   |   |  |  |
| <input type="checkbox"/> Option To Extend Initial End Date / Option pour prolonger la date de fin initiale   |   |   |  |  |
| Optional End Date(S) / Date(s) de fin optionnelle(s)   | Status / Statut   |   |  |  |
|  | <input checked="" type="radio"/> In Effect / en vigueur |   |  |  |
| Travel Requirement(s) / Exigence(s) de voyage : n/a  |   |   |  |  |
| Work Location(s) / Lieu(x) de travail :  |   |   |  |  |

### **PART 2** (completed by the Contractor and/or the Technical/Project Authority) / **PARTIE 2** (complété par le Contracteur et/ou le Responsable technique / Chargé du projet)

| <b>Contractor Resource(s) and Estimated Cost / Ressource(s) du Contracteur et Coût total estimatif</b>  |   |   |                                    |  |  |
|---|---|---|------------------------------------|--|--|
| Note: once approved, only the following resources may provide services under this TA. / Nota : une fois approuvée, seules les ressources suivantes peuvent fournir des services sous la présente AT |   |   |                                    |  |  |
| Name / Nom<br>Category and Level / Catégorie et Niveau  | PWGSC Security File No. /<br>Nº du dossier de sécurité<br>TPSGC | Linguistic Profile /<br>Profil linguistique | Per Diem Rate /<br>Taux journalier | Estimated Level of Effort (days) / Niveau d'effort estimatif (jours) | Total Estimated Cost /<br>Coût total estimatif |
| 0   |   |   |                                    |  | \$0.00   |
| 0   |   |   |                                    |  | \$0.00   |

|   |  |   |
|---|--|---|
|   | Estimated Cost / Coût estimatif                            | \$0.00  |
| Total Estimated Travel and Living Cost / Coût total estimatif de voyage et de vie |  | \$0.00  |
| <b>Total Estimated Cost / Coût total estimatif</b>                                |  | <b>\$0.00</b>   |
| Check applicable Basis of Payment /<br>Cocher la Base de Paiement applicable :    | Maximum Price /<br>Prix Maximum : <input type="checkbox"/> | Firm Price /<br>Prix Ferme : <input type="checkbox"/> |

### PART 3 - TA APPROVAL BY CANADA / PARTIE 3 - APPROBATION DE L'AT PAR LE CANADA

By signing this TA, the Technical Authority, the representative from the SPMMD of CBSA and/or the PWGSC Contracting Authority certify(ies) that the content of this TA is in accordance with the conditions of the Contract.

The client's authorization limit is \$250,000. When the value of a TA and its amendments (excluding Applicable Taxes) is in excess of this limit, the TA must be signed by the authorized client and forwarded to the PWGSC Contracting Authority for authorization.

En apposant sa signature sur l'AT, l'autorité technique, le représentant de la DAGBS de l'ASFC et/ou l'autorité contractante de TPSGC atteste(nt) que le contenu de cette AT est conforme aux conditions du contrat.

La limite d'autorisation du client est \$250,000. Lorsque la valeur de l'AT et ses modifications (excluant les taxes applicables) dépasse cette limite, l'AT doit être signée par le client autorisé et transmise à l'autorité contractante de TPSGC pour autorisation.

Name of Technical Authority / Nom de l'autorité technique Date Name of Contracting Authority / Nom de l'autorité contractante Date

Signature \_\_\_\_\_ Signature \_\_\_\_\_

Name of the representative from the SPMMD of CBSA /  
Nom d'un représentant de la DAGBS de l'ASFC Date

Signature \_\_\_\_\_

### PART 4 - CONTRACTOR SIGNATURE / PARTIE 4 - SIGNATURE DU CONTRACTEUR

Name and Title of individual authorized to sign on behalf of the Contractor /  
Nom et titre Signature de la personne autorisée à signer au nom de l'entrepreneur Signature Date

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## APPENDIX C TO ANNEX A RESOURCES ASSESSMENT CRITERIA AND RESPONSE TABLE

To facilitate resource assessment, Contractors must prepare and submit a response to a draft Task Authorization using the tables provided in this Appendix. When completing the resource grids, the specific information which demonstrates the requested criteria and reference to the page or project number of the résumé should be incorporated so that Canada can verify this information. The tables should not contain all the project information from the resume. Only the specific answer should be provided.

The following provides a guide as to how to complete this Appendix:

This Appendix is structured into 4 components:

1. Resource Technology and Certification Requirements;
2. Resource Mandatory Criteria;
3. Resource Point-Rated Criteria; and
4. Evaluation Grid and Weights (for Resource Point-Rated Criteria).

Draft TA preparation by CBSA:

Prior to issuing a draft TA, CBSA will complete the following elements.

1. Resource Technology and Certification Requirements, CBSA will identify:
  - a. The resource category and level.
  - b. Applicable technologies: these can be Essential (E) or Desirable (D). An "E" or "D" must be inserted next to the applicable technology(ies).
  - c. Applicable certifications, if any: these can be Desirable (D) only. Where a certification(s) is(are) applicable, a "D" must be inserted next to the applicable Certification(s).
2. Resource Point-Rated Criteria: CBSA will identify the Rated requirements (R1-R4) applicable to the draft TA.
3. Evaluation Grid and Weights: CBSA will complete the applicable grid elements and weights.

Key boundaries:

- a. Up to the maximum number of technologies identified as Essential in the table below can be requested in a draft TA; and
- b. No more than 50% of overall weight per Rated Requirement.

Response by the Contractor:

In response, the Contractor must complete the following:

1. Resource name;
2. Responses to M1 and M2; and
3. Responses to applicable R1-R4.

Evaluation:

An example of evaluation is provided under the table below.

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| Resource Category                                     | Level | Total # of Technologies | Total # of Certifications* | Maximum # Technologies as Essential |
|---|-------|-------------------------|----------------------------|-------------------------------------|
| <b><u>Workstream 1</u></b>                            |       |                         |                            |                                     |
| Enterprise Resource Planning (ERP) Functional Analyst | L2,L3 | 7                       | 1                          | 5                                   |
| Test Coordinator                                      | L2,L3 | 19                      | 0                          | 3                                   |
| Tester  | L3    | 19                      | 0                          | 3                                   |
| Data Conversion Specialist                            | L2,L3 | 10                      | 3                          | 2                                   |
| Database Modeller / IM Modeller                       | L3    | 10                      | 3                          | 2                                   |
| IM Architect  | L3    | 19                      | 2                          | 2                                   |
| Technology Architect                                  | L3    | 15                      | 4                          | 2                                   |
| Enterprise Architect                                  | L3    | 15                      | 4                          | 2                                   |
| Business Analyst                                      | L2,L3 | 6                       | 2                          | 2                                   |
| Technical Writer                                      | L2,L3 | 2                       | 0                          | 1                                   |
| Project Executive                                     | L3    | 3                       | 4                          | 2                                   |
| Project Coordinator                                   | L3    | 3                       | 1                          | 2                                   |
| Project Manager                                       | L2,L3 | 3                       | 4                          | 2                                   |
| <b><u>Workstream 2</u></b>                            |       |                         |                            |                                     |
| GIS Application Architect                             | L2,L3 | 4                       | 1                          | 2                                   |
| GIS Data Architect                                    | L2,L3 | 4                       | 1                          | 2                                   |
| GIS System Architect                                  | L2,L3 | 4                       | 1                          | 2                                   |
| PIA Specialist  | L2,L3 | 2                       | 3                          | 1                                   |

**\*All Certifications must be Desirable only.**

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## EXAMPLE - EVALUATION

For this scenario, CBSA wants to request a Data Conversion Specialist - Level 2, with the following Technology and Certification requirements:

- Essential Technology Requirements (no more than 2 for this category):

- (1) MS Office Suite (Word, Excel, PowerPoint)
- (2) IBM InfoSphere Data Architect

- Desirable Technology Requirements:

- (1) IBM PureData
- (2) IBM DB2 V9+

- Desirable Certification Requirement:

- (1) ITIL V3 Certification

The proposed resource has 75 months experience within the past 7 years of the draft TA issuance date executing at least 60% of the tasks enumerated at Article 3 of Annex A for a Data Conversion Specialist - Level 2.

Based on the experience submitted under M1, the proposed resource has 30 months within the past 48 months of the draft TA issuance date using IBM InfoSphere Data Architect.

Based on the experience submitted under M1, the proposed resource has 44 months within the past 48 months of the draft TA issuance date using MS Office Suite (Word, Excel, Powerpoint).

The proposed resource has 18 months experience using IBM PureData.

The proposed resource has 18 months experience using IBM DB2 V9+.

The proposed resource holds the Certification ITIL V3 Certification.

For this scenario and based on the evaluation weight per criterion determined by the Client, the resource proposed by ABC Inc. would achieve a score of 76.50% and be deemed responsive.

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### Data Conversion Specialist

TA #: X

Contractor Name: ABC Inc.

Proposed Resource Name: John Doe

Level:  2  
 3

### 1. RESOURCE TECHNOLOGY AND CERTIFICATION REQUIREMENTS

#### RESOURCE ESSENTIAL (E) DESIRABLE (D) TECHNOLOGY REQUIREMENT(S)

|                                       |                               |                                       |             |                                       |   |
|---------------------------------------|-------------------------------|---------------------------------------|-------------|---------------------------------------|---|
| <input checked="" type="checkbox"/> E | IBM InfoSphere Data Architect | <input checked="" type="checkbox"/> D | IBM DB2 V9+ | <input checked="" type="checkbox"/> E | MS Office Suite (Word, Excel, PowerPoint) |
| <input type="checkbox"/>              | CA Erwin Data Modeler V9+     | <input type="checkbox"/>              | SQL         | <input type="checkbox"/>              | MS Visio                                  |
| <input type="checkbox"/>              | IBM Data Studio V4+           | <input type="checkbox"/>              | XML         | <input type="checkbox"/>              | Kimball Dimensional Methodology           |
| <input checked="" type="checkbox"/> D | IBM PureData                  |                                       |             |                                       |   |

#### RESOURCE DESIRABLE (D) CERTIFICATION REQUIREMENT(S)

|                          |   |                          |   |                                       |                       |
|--------------------------|---|--------------------------|---|---------------------------------------|-----------------------|
| <input type="checkbox"/> | Certified Business Intelligence Professional (CBIP) | <input type="checkbox"/> | IBM Certified Data Architect - Big Data | <input checked="" type="checkbox"/> D | ITIL V3 Certification |
|--------------------------|---|--------------------------|---|---------------------------------------|-----------------------|

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## 2. RESOURCE MANDATORY CRITERIA

| ID | Mandatory Criteria   | Bidder's response |   |
|----|--|-------------------|---|
|    |  | Met<br>(Yes/No)   | Demonstrated Experience<br>(Bidders to insert cross reference to<br>assigned resource project reference<br>number(s)) |
| M1 | <p>The Contractor must demonstrate that the proposed resource has the minimum number of years of experience specified below:</p> <p><b>For Level 2 resource categories the requirement is as follows:</b> The resource must have 5 years experience within the past 7 years of the draft TA issuance date executing at least 60% of the tasks enumerated at Article 3 of Annex A for the specific resource category identified in the draft TA.</p> <p><b>For Level 3 resource categories the requirement is as follows:</b> The resource must have 10 years experience within the past 15 years of the draft TA issuance date executing at least 60% of the tasks enumerated at Article 3 of Annex A for the specific resource category identified in the draft TA.</p> | Yes               |   |
| M2 | <p>The Contractor must demonstrate that the proposed resource's experience submitted under M1 includes the minimum number of months of experience specified below:</p> <p><b>For Level 2 resource categories the requirement is as follows:</b> The resource must have 2 years experience within the past 4 years of the draft TA issuance date using the technology(ies) identified as Essential (E).</p> <p><b>For Level 3 resource categories the requirement is as follows:</b> The resource must have 4 years experience within the past 8 years of the draft TA issuance date using the technology(ies) identified as Essential (E).</p>   | Yes               |   |

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**3. RESOURCE POINT-RATED CRITERIA**

| ID | Applicable or not?<br>(Client to insert "X" in boxes for the criteria that apply)   | Point Rated Criteria   | Max Points      | Point Allocation Grid   | Bidder's response   |
|----|---|--|-----------------|---|---|
|    |   |  |                 |   | Demonstrated Experience<br>(Bidders to insert cross reference to assigned resource project reference number(s)) |
| R1 |    | Points will be awarded for experience over and above the required in M1.   | 10              | <p><b>For Level 2 Resource:</b><br/>5+ to 6 years = 5 points<br/>6+ years = 10 points</p> <p><b>For Level 3 Resource:</b><br/>10+ to 11 years = 2 points<br/>11+ to 12 years = 4 points<br/>12+ to 13 years = 6 points<br/>13+ to 14 years = 8 points<br/>14+ years = 10 points</p> |   |
| R2 |    | Points will be awarded for experience over and above the required in M2.   | 10 per element* | <p><b>For each Element:</b></p> <p><b>For Level 2 Resource:</b><br/>2+ to 3 years = 5 points<br/>3+ years = 10 points</p> <p><b>For Level 3 Resource:</b><br/>4+ to 5 years = 3 points<br/>5+ to 6 years = 7 points<br/>6+ years = 10 points</p>                                    |   |
| R3 |  | The Contractor should demonstrate that the proposed resource has experience in each of the Technology (Element) identified as Desirable ("D"). | 10 per element* | <p><b>For each Element:</b></p> <p>0 to 1 year = 0 points<br/>1+ to 2 years = 2 points<br/>2+ to 3 years = 4 points<br/>3+ to 4 years = 6 points<br/>4+ to 5 years = 8 points<br/>5+ years = 10 points</p>  |   |

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|    |   |  |                 |  |  |
|----|---|--|-----------------|--|--|
| R4 |  | The Contractor should demonstrate that the proposed resource holds the Certification(s) (Element) identified as Desirable ("D"). | 10 per element* | The proposed resource is a holder of the certification = 10 points |  |
|----|---|--|-----------------|--|--|

\*Evaluation Weights (for R1 to R4) are identified at time of issuance of a draft TA and accompanies each TA:

#### 4. EVALUATION GRID AND WEIGHTS

| ID                                      |  | Max Points | Points Achieved by Contractor (A) | Evaluation Weight (B)<br><i>(to be completed at tasking time)</i> | Weighted Result<br>(A x B) |
|---|--|------------|-----------------------------------|---|----------------------------|
| R1                                      |  | 10         | 10                                | 35%   | 3.5                        |
| R2                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                            |
|   | IBM Infosphere Data Architect            | 10         | 5                                 | 15%   | 0.75                       |
| R3                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                            |
|   | IBM Pure Data                            | 10         | 2                                 | 10%   | 0.2                        |
| R4                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                            |
|   | IBM DB2 V9+                              | 10         | 2                                 | 10%   | 0.2                        |
| R4                                      |  |            |                                   |   |                            |
| ITIL V3 Certification                   |  | 10         | 10                                | 15%   | 1.5                        |
| Total Weight <b>(must equal 100%)</b> : |  |            | 100%                              |   |                            |
| Total Score**:                          |  |            |                                   | 76.50%  |                            |

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**\*\*Each proposed resource must meet the minimum pass mark of 70% to be deemed responsive.**

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### Enterprise Resource Planning (ERP) Functional Analyst

TA #: \_\_\_\_\_

Contractor Name: \_\_\_\_\_

Proposed Resource Name: \_\_\_\_\_

Level:  2  
 3

#### 1. RESOURCE TECHNOLOGY AND CERTIFICATION REQUIREMENTS

##### RESOURCE ESSENTIAL (E) DESIRABLE (D) TECHNOLOGY REQUIREMENT(S)

|   |  |                                       |
|---|--|---------------------------------------|
| <input type="checkbox"/> SAP Business Warehouse | <input type="checkbox"/> MS Office Suite (Word, Excel, Powerpoint) | <input type="checkbox"/> ABAP         |
| <input type="checkbox"/> SAP Workflow           | <input type="checkbox"/> MS Visio                                  | <input type="checkbox"/> SAP Business |
| <input type="checkbox"/> SAP Dashboard          |  |                                       |

##### RESOURCE DESIRABLE (D) CERTIFICATION REQUIREMENT(S)

|   |
|---|
| <input type="checkbox"/> Business Objects Certification |
|---|

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## 2. RESOURCE MANDATORY CRITERIA

| ID | Mandatory Criteria   | Bidder's response |   |
|----|--|-------------------|---|
|    |  | Met<br>(Yes/No)   | Demonstrated Experience<br>(Bidders to insert cross reference to<br>assigned resource project reference<br>number(s)) |
| M1 | <p>The Contractor must demonstrate that the proposed resource has the minimum number of years of experience specified below:</p> <p><b>For Level 2 resource categories the requirement is as follows:</b> The resource must have 5 years experience within the past 7 years of the draft TA issuance date executing at least 60% of the tasks enumerated at Article 3 of Annex A for the specific resource category identified in the draft TA.</p> <p><b>For Level 3 resource categories the requirement is as follows:</b> The resource must have 10 years experience within the past 15 years of the draft TA issuance date executing at least 60% of the tasks enumerated at Article 3 of Annex A for the specific resource category identified in the draft TA.</p> |                   |   |
| M2 | <p>The Contractor must demonstrate that the proposed resource's experience submitted under M1 includes the minimum number of months of experience specified below:</p> <p><b>For Level 2 resource categories the requirement is as follows:</b> The resource must have 2 years experience within the past 4 years of the draft TA issuance date using the technology(ies) identified as Essential (E).</p> <p><b>For Level 3 resource categories the requirement is as follows:</b> The resource must have 4 years experience within the past 8 years of the draft TA issuance date using the technology(ies) identified as Essential (E).</p>   |                   |   |

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### 3. RESOURCE POINT-RATED CRITERIA

| ID | Applicable or not?<br>(Client to insert "X" in boxes for the criteria that apply) | Point Rated Criteria   | Max Points      | Point Allocation Grid   | Bidder's response   |
|----|---|--|-----------------|---|---|
|    |   |  |                 |   | Demonstrated Experience<br>(Bidders to insert cross reference to assigned resource project reference number(s)) |
| R1 | <input type="checkbox"/>  | Points will be awarded for experience over and above the required in M1.   | 10              | <p><b>For Level 2 Resource:</b><br/>5+ to 6 years = 5 points<br/>6+ years = 10 points</p> <p><b>For Level 3 Resource:</b><br/>10+ to 11 years = 2 points<br/>11+ to 12 years = 4 points<br/>12+ to 13 years = 6 points<br/>13+ to 14 years = 8 points<br/>14+ years = 10 points</p> |   |
| R2 | <input type="checkbox"/>  | Points will be awarded for experience over and above the required in M2.   | 10 per element* | <p><b>For each Element:</b></p> <p><b>For Level 2 Resource:</b><br/>2+ to 3 years = 5 points<br/>3+ years = 10 points</p> <p><b>For Level 3 Resource:</b><br/>4+ to 5 years = 3 points<br/>5+ to 6 years = 7 points<br/>6+ years = 10 points</p>                                    |   |
| R3 | <input type="checkbox"/>  | The Contractor should demonstrate that the proposed resource has experience in each of the Technology (Element) identified as Desirable ("D"). | 10 per element* | <p><b>For each Element:</b></p> <p>0 to 1 year = 0 points<br/>1+ to 2 years = 2 points<br/>2+ to 3 years = 4 points<br/>3+ to 4 years = 6 points<br/>4+ to 5 years = 8 points<br/>5+ years = 10 points</p>  |   |

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|    |                          |  |                 |  |  |
|----|--------------------------|--|-----------------|--|--|
| R4 | <input type="checkbox"/> | The Contractor should demonstrate that the proposed resource holds the Certification(s) (Element) identified as Desirable ("D"). | 10 per element* | The proposed resource is a holder of the certification = 10 points |  |
|----|--------------------------|--|-----------------|--|--|

\*Evaluation Weights (for R1 to R4) are identified at time of issuance of a draft TA and accompanies each TA:

#### 4. EVALUATION GRID AND WEIGHTS

| ID                                      |  | Max Points | Points Achieved by Contractor (A) | Evaluation Weight (B)<br><i>(to be completed at tasking time)</i> | Weighted Result (A x B) |
|---|--|------------|-----------------------------------|---|-------------------------|
| R1                                      |  | 10         |                                   |   | 0                       |
| R2                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                         |
|   | Element 1                                | 10         |                                   |   | 0                       |
|   | Element 2                                | 10         |                                   |   | 0                       |
| R3                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                         |
|   | Element 1                                | 10         |                                   |   | 0                       |
|   | Etc.                                     | 10         |                                   |   | 0                       |
| R4                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                         |
|   | Element 1                                | 10         |                                   |   | 0                       |
|   | Etc.                                     | 10         |                                   |   | 0                       |
| Total Weight <b>(must equal 100%)</b> : |  |            | 0%                                |   |                         |
| Total Score**:                          |  |            |                                   | 0%  |                         |

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**\*\*Each proposed resource must meet the minimum pass mark of 70% to be deemed responsive.**

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**Test Coordinator**

TA #: \_\_\_\_\_

Contractor Name: \_\_\_\_\_

Proposed Resource Name: \_\_\_\_\_

Level:  2  
 3

**1. RESOURCE TECHNOLOGY AND CERTIFICATION REQUIREMENTS**

**RESOURCE ESSENTIAL (E) DESIRABLE (D) TECHNOLOGY REQUIREMENT(S)**

|   |   |  |
|---|---|--|
| <input type="checkbox"/> Data Warehouse                               | <input type="checkbox"/> IBM Cognos Workspace           | <input type="checkbox"/> MS Word                         |
| <input type="checkbox"/> BI software                                  | <input type="checkbox"/> IBM Cognos Workspace Advanced  | <input type="checkbox"/> MS Excel                        |
| <input type="checkbox"/> IBM Cognos Framework Manager                 | <input type="checkbox"/> IBM Cognos Event Studio        | <input type="checkbox"/> MS PowerPoint                   |
| <input type="checkbox"/> IBM Cognos Business Intelligence Transformer | <input type="checkbox"/> IBM Cognos Mobile Applications | <input type="checkbox"/> MS Visio                        |
| <input type="checkbox"/> IBM Cognos Administration                    | <input type="checkbox"/> IBM Cognos TM1                 | <input type="checkbox"/> IBM Cognos for Microsoft Office |
| <input type="checkbox"/> IBM Cognos PowerPlay Studio                  | <input type="checkbox"/> IBM Cognos Analysis Studio     | <input type="checkbox"/> IBM Cognos Report Studio        |
| IBM Cognos Software Development Kit                                   |   |  |

**RESOURCE DESIRABLE (D) CERTIFICATION REQUIREMENT(S)**

NON APPLICABLE

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## 2. RESOURCE MANDATORY CRITERIA

| ID | Mandatory Criteria   | Bidder's response |   |
|----|--|-------------------|---|
|    |  | Met<br>(Yes/No)   | Demonstrated Experience<br>(Bidders to insert cross reference to<br>assigned resource project reference<br>number(s)) |
| M1 | <p>The Contractor must demonstrate that the proposed resource has the minimum number of years of experience specified below:</p> <p><b>For Level 2 resource categories the requirement is as follows:</b> The resource must have 5 years experience within the past 7 years of the draft TA issuance date executing at least 60% of the tasks enumerated at Article 3 of Annex A for the specific resource category identified in the draft TA.</p> <p><b>For Level 3 resource categories the requirement is as follows:</b> The resource must have 10 years experience within the past 15 years of the draft TA issuance date executing at least 60% of the tasks enumerated at Article 3 of Annex A for the specific resource category identified in the draft TA.</p> |                   |   |
| M2 | <p>The Contractor must demonstrate that the proposed resource's experience submitted under M1 includes the minimum number of months of experience specified below:</p> <p><b>For Level 2 resource categories the requirement is as follows:</b> The resource must have 2 years experience within the past 4 years of the draft TA issuance date using the technology(ies) identified as Essential (E).</p> <p><b>For Level 3 resource categories the requirement is as follows:</b> The resource must have 4 years experience within the past 8 years of the draft TA issuance date using the technology(ies) identified as Essential (E).</p>   |                   |   |

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### 3. RESOURCE POINT-RATED CRITERIA

| ID | Applicable or not?<br>(Client to insert "X" in boxes for the criteria that apply) | Point Rated Criteria   | Max Points      | Point Allocation Grid   | Bidder's response   |
|----|---|--|-----------------|---|---|
|    |   |  |                 |   | Demonstrated Experience<br>(Bidders to insert cross reference to assigned resource project reference number(s)) |
| R1 | <input type="checkbox"/>  | Points will be awarded for experience over and above the required in M1.   | 10              | <p><b>For Level 2 Resource:</b><br/>5+ to 6 years = 5 points<br/>6+ years = 10 points</p> <p><b>For Level 3 Resource:</b><br/>10+ to 11 years = 2 points<br/>11+ to 12 years = 4 points<br/>12+ to 13 years = 6 points<br/>13+ to 14 years = 8 points<br/>14+ years = 10 points</p> |   |
| R2 | <input type="checkbox"/>  | Points will be awarded for experience over and above the required in M2.   | 10 per element* | <p><b>For each Element:</b></p> <p><b>For Level 2 Resource:</b><br/>2+ to 3 years = 5 points<br/>3+ years = 10 points</p> <p><b>For Level 3 Resource:</b><br/>4+ to 5 years = 3 points<br/>5+ to 6 years = 7 points<br/>6+ years = 10 points</p>                                    |   |
| R3 | <input type="checkbox"/>  | The Contractor should demonstrate that the proposed resource has experience in each of the Technology (Element) identified as Desirable ("D"). | 10 per element* | <p><b>For each Element:</b></p> <p>0 to 1 year = 0 points<br/>1+ to 2 years = 2 points<br/>2+ to 3 years = 4 points<br/>3+ to 4 years = 6 points<br/>4+ to 5 years = 8 points<br/>5+ years = 10 points</p>  |   |

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|    |                          |  |                 |  |  |
|----|--------------------------|--|-----------------|--|--|
| R4 | <input type="checkbox"/> | The Contractor should demonstrate that the proposed resource holds the Certification(s) (Element) identified as Desirable ("D"). | 10 per element* | The proposed resource is a holder of the certification = 10 points |  |
|----|--------------------------|--|-----------------|--|--|

\*Evaluation Weights (for R1 to R4) are identified at time of issuance of a draft TA and accompanies each TA:

#### 4. EVALUATION GRID AND WEIGHTS

| ID                                      |  | Max Points | Points Achieved by Contractor (A) | Evaluation Weight (B)<br><i>(to be completed at tasking time)</i> | Weighted Result (A x B) |
|---|--|------------|-----------------------------------|---|-------------------------|
| R1                                      |  | 10         |                                   |   | 0                       |
| R2                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                         |
|   | Element 1                                | 10         |                                   |   | 0                       |
|   | Element 2                                | 10         |                                   |   | 0                       |
|   | Etc.                                     | 10         |                                   |   | 0                       |
| R3                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                         |
|   | Element 1                                | 10         |                                   |   | 0                       |
|   | Etc.                                     | 10         |                                   |   | 0                       |
| R4                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                         |
|   | Element 1                                | 10         |                                   |   | 0                       |
|   | Etc.                                     | 10         |                                   |   | 0                       |
| Total Weight <b>(must equal 100%)</b> : |  |            | 0%                                |   |                         |
| Total Score**:                          |  |            |                                   | 0%  |                         |

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**\*\*Each proposed resource must meet the minimum pass mark of 70% to be deemed responsive.**

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**Tester**

TA #: \_\_\_\_\_

Contractor Name: \_\_\_\_\_

Proposed Resource Name: \_\_\_\_\_

Level:  3

### **1. RESOURCE TECHNOLOGY AND CERTIFICATION REQUIREMENTS**

#### **RESOURCE ESSENTIAL (E) DESIRABLE (D) TECHNOLOGY REQUIREMENT(S)**

|   |   |  |
|---|---|--|
| <input type="checkbox"/> Data Warehouse                               | <input type="checkbox"/> IBM Cognos Workspace           | <input type="checkbox"/> MS Word                         |
| <input checked="" type="checkbox"/> BI software                       | <input type="checkbox"/> IBM Cognos Workspace Advanced  | <input type="checkbox"/> MS Excel                        |
| <input type="checkbox"/> IBM Cognos Framework Manager                 | <input type="checkbox"/> IBM Cognos Event Studio        | <input type="checkbox"/> MS PowerPoint                   |
| <input type="checkbox"/> IBM Cognos Business Intelligence Transformer | <input type="checkbox"/> IBM Cognos Mobile Applications | <input type="checkbox"/> MS Visio                        |
| <input type="checkbox"/> IBM Cognos Administration                    | <input type="checkbox"/> IBM Cognos TM1                 | <input type="checkbox"/> IBM Cognos for Microsoft Office |
| <input type="checkbox"/> IBM Cognos PowerPlay Studio                  | <input type="checkbox"/> IBM Cognos Analysis Studio     | <input type="checkbox"/> IBM Cognos Report Studio        |
| <input type="checkbox"/> IBM Cognos Software Development Kit          |   |  |

#### **RESOURCE DESIRABLE (D) CERTIFICATION REQUIREMENT(S)**

NON APPLICABLE

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## 2. RESOURCE MANDATORY CRITERIA

| ID | Mandatory Criteria   | Bidder's response |   |
|----|--|-------------------|---|
|    |  | Met<br>(Yes/No)   | Demonstrated Experience<br>(Bidders to insert cross reference to<br>assigned resource project reference<br>number(s)) |
| M1 | <p>The Contractor must demonstrate that the proposed resource has the minimum number of years of experience specified below:</p> <p><b>For Level 2 resource categories the requirement is as follows:</b> The resource must have 5 years experience within the past 7 years of the draft TA issuance date executing at least 60% of the tasks enumerated at Article 3 of Annex A for the specific resource category identified in the draft TA.</p> <p><b>For Level 3 resource categories the requirement is as follows:</b> The resource must have 10 years experience within the past 15 years of the draft TA issuance date executing at least 60% of the tasks enumerated at Article 3 of Annex A for the specific resource category identified in the draft TA.</p> |                   |   |
| M2 | <p>The Contractor must demonstrate that the proposed resource's experience submitted under M1 includes the minimum number of months of experience specified below:</p> <p><b>For Level 2 resource categories the requirement is as follows:</b> The resource must have 2 years experience within the past 4 years of the draft TA issuance date using the technology(ies) identified as Essential (E).</p> <p><b>For Level 3 resource categories the requirement is as follows:</b> The resource must have 4 years experience within the past 8 years of the draft TA issuance date using the technology(ies) identified as Essential (E).</p>   |                   |   |

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### 3. RESOURCE POINT-RATED CRITERIA

| ID | Applicable or not?<br>(Client to insert "X" in boxes for the criteria that apply) | Point Rated Criteria   | Max Points      | Point Allocation Grid  | Bidder's response   |
|----|---|--|-----------------|--|---|
|    |   |  |                 |  | Demonstrated Experience<br>(Bidders to insert cross reference to assigned resource project reference number(s)) |
| R1 | <input type="checkbox"/>  | Points will be awarded for experience over and above the required in M1.   | 10              | <p><b>For Level 2 Resource:</b><br/>5+ to 6 years = 5 points<br/>6+ years = 10 points</p> <p><b>For Level 3 Resource:</b><br/>10+ to 11 years = 2 points<br/>11+ to 12 years = 4 points<br/>12+ to 13 years = 6 points<br/>13 + to 14 years = 8 points<br/>14+ years = 10 points</p> |   |
| R2 | <input type="checkbox"/>  | Points will be awarded for experience over and above the required in M2.   | 10 per element* | <p><b>For each Element:</b></p> <p><b>For Level 2 Resource:</b><br/>2+ to 3 years = 5 points<br/>3+ years = 10 points</p> <p><b>For Level 3 Resource:</b><br/>4+ to 5 years = 3 points<br/>5+ to 6 years = 7 points<br/>6+ years = 10 points</p>                                     |   |
| R3 | <input type="checkbox"/>  | The Contractor should demonstrate that the proposed resource has experience in each of the Technology (Element) identified as Desirable ("D"). | 10 per element* | <p><b>For each Element:</b></p> <p>0 to 1 year = 0 points<br/>1+ to 2 years = 2 points<br/>2+ to 3 years = 4 points<br/>3+ to 4 years = 6 points<br/>4+ to 5 years = 8 points<br/>5+ years = 10 points</p>   |   |

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|    |                          |  |                 |  |  |
|----|--------------------------|--|-----------------|--|--|
| R4 | <input type="checkbox"/> | The Contractor should demonstrate that the proposed resource holds the Certification(s) (Element) identified as Desirable ("D"). | 10 per element* | The proposed resource is a holder of the certification = 10 points |  |
|----|--------------------------|--|-----------------|--|--|

\*Evaluation Weights (for R1 to R4) are identified at time of issuance of a draft TA and accompanies each TA:

#### 4. EVALUATION GRID AND WEIGHTS

| ID                                      |  | Max Points | Points Achieved by Contractor (A) | Evaluation Weight (B)<br><i>(to be completed at tasking time)</i> | Weighted Result (A x B) |
|---|--|------------|-----------------------------------|---|-------------------------|
| R1                                      |  | 10         |                                   |   | 0                       |
| R2                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                         |
|   | Element 1                                | 10         |                                   |   | 0                       |
|   | Element 2                                | 10         |                                   |   | 0                       |
|   | Etc.                                     | 10         |                                   |   | 0                       |
| R3                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                         |
|   | Element 1                                | 10         |                                   |   | 0                       |
|   | Etc.                                     | 10         |                                   |   | 0                       |
|   | <i>(to be completed at tasking time)</i> |            |                                   |   |                         |
| R4                                      | Element 1                                | 10         |                                   |   | 0                       |
|   | Etc.                                     | 10         |                                   |   | 0                       |
| Total Weight <i>(must equal 100%)</i> : |  |            | 0%                                |   |                         |
| Total Score**:                          |  |            |                                   | 0%  |                         |

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**\*\*Each proposed resource must meet the minimum pass mark of 70% to be deemed responsive.**

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### Data Conversion Specialist

TA #: \_\_\_\_\_

Contractor Name: \_\_\_\_\_

Proposed Resource Name: \_\_\_\_\_

Level:  2  
 3

### 1. RESOURCE TECHNOLOGY AND CERTIFICATION REQUIREMENTS

#### RESOURCE ESSENTIAL (E) DESIRABLE (D) TECHNOLOGY REQUIREMENT(S)

|  |                                      |  |
|--|--------------------------------------|--|
| <input type="checkbox"/> IBM InfoSphere Data Architect | <input type="checkbox"/> IBM DB2 V9+ | <input type="checkbox"/> MS Office Suite (Word, Excel, PowerPoint) |
| <input type="checkbox"/> CA Erwin Data Modeler V9+     | <input type="checkbox"/> SQL         | <input type="checkbox"/> MS Visio                                  |
| <input type="checkbox"/> IBM Data Studio V4+           | <input type="checkbox"/> XML         | <input type="checkbox"/> Kimball Dimensional Methodology           |
| <input type="checkbox"/> IBM PureData                  |                                      |  |

#### RESOURCE DESIRABLE (D) CERTIFICATION REQUIREMENT(S)

|  |  |  |
|--|--|--|
| <input type="checkbox"/> Certified Business Intelligence Professional (CBIP) | <input type="checkbox"/> IBM Certified Data Architect - Big Data | <input type="checkbox"/> ITIL V3 Certification |
|--|--|--|

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## 2. RESOURCE MANDATORY CRITERIA

| ID | Mandatory Criteria   | Bidder's response |   |
|----|--|-------------------|---|
|    |  | Met<br>(Yes/No)   | Demonstrated Experience<br>(Bidders to insert cross reference to<br>assigned resource project reference<br>number(s)) |
| M1 | <p>The Contractor must demonstrate that the proposed resource has the minimum number of years of experience specified below:</p> <p><b>For Level 2 resource categories the requirement is as follows:</b> The resource must have 5 years experience within the past 7 years of the draft TA issuance date executing at least 60% of the tasks enumerated at Article 3 of Annex A for the specific resource category identified in the draft TA.</p> <p><b>For Level 3 resource categories the requirement is as follows:</b> The resource must have 10 years experience within the past 15 years of the draft TA issuance date executing at least 60% of the tasks enumerated at Article 3 of Annex A for the specific resource category identified in the draft TA.</p> |                   |   |
| M2 | <p>The Contractor must demonstrate that the proposed resource's experience submitted under M1 includes the minimum number of months of experience specified below:</p> <p><b>For Level 2 resource categories the requirement is as follows:</b> The resource must have 2 years experience within the past 4 years of the draft TA issuance date using the technology(ies) identified as Essential (E).</p> <p><b>For Level 3 resource categories the requirement is as follows:</b> The resource must have 4 years experience within the past 8 years of the draft TA issuance date using the technology(ies) identified as Essential (E).</p>   |                   |   |

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### 3. RESOURCE POINT-RATED CRITERIA

| ID | Applicable or not?<br>(Client to insert "X" in boxes for the criteria that apply) | Point Rated Criteria   | Max Points      | Point Allocation Grid   | Bidder's response   |
|----|---|--|-----------------|---|---|
|    |   |  |                 |   | Demonstrated Experience<br>(Bidders to insert cross reference to assigned resource project reference number(s)) |
| R1 | <input type="checkbox"/>  | Points will be awarded for experience over and above the required in M1.   | 10              | <p><b>For Level 2 Resource:</b><br/>5+ to 6 years = 5 points<br/>6+ years = 10 points</p> <p><b>For Level 3 Resource:</b><br/>10+ to 11 years = 2 points<br/>11+ to 12 years = 4 points<br/>12+ to 13 years = 6 points<br/>13+ to 14 years = 8 points<br/>14+ years = 10 points</p> |   |
| R2 | <input type="checkbox"/>  | Points will be awarded for experience over and above the required in M2.   | 10 per element* | <p><b>For each Element:</b></p> <p><b>For Level 2 Resource:</b><br/>2+ to 3 years = 5 points<br/>3+ years = 10 points</p> <p><b>For Level 3 Resource:</b><br/>4+ to 5 years = 3 points<br/>5+ to 6 years = 7 points<br/>6+ years = 10 points</p>                                    |   |
| R3 | <input type="checkbox"/>  | The Contractor should demonstrate that the proposed resource has experience in each of the Technology (Element) identified as Desirable ("D"). | 10 per element* | <p><b>For each Element:</b></p> <p>0 to 1 year = 0 points<br/>1+ to 2 years = 2 points<br/>2+ to 3 years = 4 points<br/>3+ to 4 years = 6 points<br/>4+ to 5 years = 8 points<br/>5+ years = 10 points</p>  |   |

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|    |                          |  |                 |  |  |
|----|--------------------------|--|-----------------|--|--|
| R4 | <input type="checkbox"/> | The Contractor should demonstrate that the proposed resource holds the Certification(s) (Element) identified as Desirable ("D"). | 10 per element* | The proposed resource is a holder of the certification = 10 points |  |
|----|--------------------------|--|-----------------|--|--|

\*Evaluation Weights (for R1 to R4) are identified at time of issuance of a draft TA and accompanies each TA:

#### 4. EVALUATION GRID AND WEIGHTS

| ID                                      |  | Max Points | Points Achieved by Contractor (A) | Evaluation Weight (B)<br><i>(to be completed at tasking time)</i> | Weighted Result (A x B) |
|---|--|------------|-----------------------------------|---|-------------------------|
| R1                                      |  | 10         |                                   |   | 0                       |
| R2                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                         |
|   | Element 1                                | 10         |                                   |   | 0                       |
|   | Element 2                                | 10         |                                   |   | 0                       |
| R3                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                         |
|   | Element 1                                | 10         |                                   |   | 0                       |
|   | Etc.                                     | 10         |                                   |   | 0                       |
| R4                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                         |
|   | Element 1                                | 10         |                                   |   | 0                       |
|   | Etc.                                     | 10         |                                   |   | 0                       |
| Total Weight <i>(must equal 100%)</i> : |  |            | 0%                                |   |                         |
| Total Score**:                          |  |            |                                   | 0%  |                         |

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**\*\*Each proposed resource must meet the minimum pass mark of 70% to be deemed responsive.**

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### Database Modeller / IM Modeller

TA #: \_\_\_\_\_

Contractor Name: \_\_\_\_\_

Proposed Resource Name: \_\_\_\_\_

Level:  3

### 1. RESOURCE TECHNOLOGY AND CERTIFICATION REQUIREMENTS

#### RESOURCE ESSENTIAL (E) DESIRABLE (D) TECHNOLOGY REQUIREMENT(S)

|  |                                      |  |
|--|--------------------------------------|--|
| <input type="checkbox"/> IBM InfoSphere Data Architect | <input type="checkbox"/> IBM DB2 V9+ | <input type="checkbox"/> MS Office Suite (Word, Excel, PowerPoint) |
| <input type="checkbox"/> CA Erwin Data Modeler V9+     | <input type="checkbox"/> SQL         | <input type="checkbox"/> MS Visio                                  |
| <input type="checkbox"/> IBM Data Studio V4+           | <input type="checkbox"/> XML         | <input type="checkbox"/> Kimball Dimensional Methodology           |
| <input type="checkbox"/> IBM PureData                  |                                      |  |

#### RESOURCE DESIRABLE (D) CERTIFICATION REQUIREMENT(S)

|  |  |  |
|--|--|--|
| <input type="checkbox"/> Certified Business Intelligence Professional (CBIP) | <input type="checkbox"/> IBM Certified Data Architect - Big Data | <input type="checkbox"/> ITIL V3 Certification |
|--|--|--|

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## 2. RESOURCE MANDATORY CRITERIA

| ID | Mandatory Criteria   | Bidder's response |   |
|----|--|-------------------|---|
|    |  | Met<br>(Yes/No)   | Demonstrated Experience<br>(Bidders to insert cross reference to<br>assigned resource project reference<br>number(s)) |
| M1 | <p>The Contractor must demonstrate that the proposed resource has the minimum number of years of experience specified below:</p> <p><b>For Level 2 resource categories the requirement is as follows:</b> The resource must have 5 years experience within the past 7 years of the draft TA issuance date executing at least 60% of the tasks enumerated at Article 3 of Annex A for the specific resource category identified in the draft TA.</p> <p><b>For Level 3 resource categories the requirement is as follows:</b> The resource must have 10 years experience within the past 15 years of the draft TA issuance date executing at least 60% of the tasks enumerated at Article 3 of Annex A for the specific resource category identified in the draft TA.</p> |                   |   |
| M2 | <p>The Contractor must demonstrate that the proposed resource's experience submitted under M1 includes the minimum number of months of experience specified below:</p> <p><b>For Level 2 resource categories the requirement is as follows:</b> The resource must have 2 years experience within the past 4 years of the draft TA issuance date using the technology(ies) identified as Essential (E).</p> <p><b>For Level 3 resource categories the requirement is as follows:</b> The resource must have 4 years experience within the past 8 years of the draft TA issuance date using the technology(ies) identified as Essential (E).</p>   |                   |   |

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### 3. RESOURCE POINT-RATED CRITERIA

| ID | Applicable or not?<br>(Client to insert "X" in boxes for the criteria that apply) | Point Rated Criteria   | Max Points      | Point Allocation Grid   | Bidder's response   |
|----|---|--|-----------------|---|---|
|    |   |  |                 |   | Demonstrated Experience<br>(Bidders to insert cross reference to assigned resource project reference number(s)) |
| R1 | <input type="checkbox"/>  | Points will be awarded for experience over and above the required in M1.   | 10              | <p><b>For Level 2 Resource:</b><br/>5+ to 6 years = 5 points<br/>6+ years = 10 points</p> <p><b>For Level 3 Resource:</b><br/>10+ to 11 years = 2 points<br/>11+ to 12 years = 4 points<br/>12+ to 13 years = 6 points<br/>13+ to 14 years = 8 points<br/>14+ years = 10 points</p> |   |
| R2 | <input type="checkbox"/>  | Points will be awarded for experience over and above the required in M2.   | 10 per element* | <p><b>For each Element:</b></p> <p><b>For Level 2 Resource:</b><br/>2+ to 3 years = 5 points<br/>3+ years = 10 points</p> <p><b>For Level 3 Resource:</b><br/>4+ to 5 years = 3 points<br/>5+ to 6 years = 7 points<br/>6+ years = 10 points</p>                                    |   |
| R3 | <input type="checkbox"/>  | The Contractor should demonstrate that the proposed resource has experience in each of the Technology (Element) identified as Desirable ("D"). | 10 per element* | <p><b>For each Element:</b></p> <p>0 to 1 year = 0 points<br/>1+ to 2 years = 2 points<br/>2+ to 3 years = 4 points<br/>3+ to 4 years = 6 points<br/>4+ to 5 years = 8 points<br/>5+ years = 10 points</p>  |   |

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|    |                          |  |                 |  |  |
|----|--------------------------|--|-----------------|--|--|
| R4 | <input type="checkbox"/> | The Contractor should demonstrate that the proposed resource holds the Certification(s) (Element) identified as Desirable ("D"). | 10 per element* | The proposed resource is a holder of the certification = 10 points |  |
|----|--------------------------|--|-----------------|--|--|

\*Evaluation Weights (for R1 to R4) are identified at time of issuance of a draft TA and accompanies each TA:

#### 4. EVALUATION GRID AND WEIGHTS

| ID                                      |  | Max Points | Points Achieved by Contractor (A) | Evaluation Weight (B)<br><i>(to be completed at tasking time)</i> | Weighted Result<br>(A x B) |
|---|--|------------|-----------------------------------|---|----------------------------|
| R1                                      |  | 10         |                                   |   | 0                          |
| R2                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                            |
|   | Element 1                                | 10         |                                   |   | 0                          |
|   | Element 2                                | 10         |                                   |   | 0                          |
|   | Etc.                                     | 10         |                                   |   | 0                          |
| R3                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                            |
|   | Element 1                                | 10         |                                   |   | 0                          |
|   | Etc.                                     | 10         |                                   |   | 0                          |
| R4                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                            |
|   | Element 1                                | 10         |                                   |   | 0                          |
|   | Etc.                                     | 10         |                                   |   | 0                          |
| Total Weight <i>(must equal 100%)</i> : |  |            | 0%                                |   |                            |
| Total Score**:                          |  |            |                                   | 0%  |                            |

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\*\*Each proposed resource must meet the minimum pass mark of 70% to be deemed responsive.

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### Technology Architect

TA #: \_\_\_\_\_

Contractor Name: \_\_\_\_\_

Proposed Resource Name: \_\_\_\_\_

Level:  3

### 1. RESOURCE TECHNOLOGY AND CERTIFICATION REQUIREMENTS

#### RESOURCE ESSENTIAL (E) DESIRABLE (D) TECHNOLOGY REQUIREMENT(S)

|   |  |  |
|---|--|--|
| <input type="checkbox"/> BI software                      | <input type="checkbox"/> CA Erwin Data Modeler V9+ | <input type="checkbox"/> MS Office Suite (Word, Excel, PowerPoint) |
| <input type="checkbox"/> Data Warehouse                   | <input type="checkbox"/> IBM Data Studio V4+       | <input type="checkbox"/> MS Visio                                  |
| <input type="checkbox"/> IBM Cognos for Microsoft Office  | <input type="checkbox"/> IBM PureData              | <input type="checkbox"/> Kimball Dimensional Methodology           |
| <input checked="" type="checkbox"/> IBM SPSS Modeler V14+ | <input type="checkbox"/> IBM DB2 V9+               | <input type="checkbox"/> IBM Infosphere Data Architect             |
| <input checked="" type="checkbox"/> IBM Cognos            | <input type="checkbox"/> SQL                       | <input type="checkbox"/> XML                                       |

#### RESOURCE DESIRABLE (D) CERTIFICATION REQUIREMENT(S)

|  |  |   |
|--|--|---|
| <input type="checkbox"/> Certified Business Intelligence Professional (CBIP) | <input type="checkbox"/> IBM Certified Data Architect - Big Data | <input type="checkbox"/> IBM Certified Solution Developer - Information Analyzer V8.5 |
| <input type="checkbox"/> IBM Certified Database Associate Certifications     |  |   |

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## 2. RESOURCE MANDATORY CRITERIA

| ID | Mandatory Criteria   | Bidder's response |   |
|----|--|-------------------|---|
|    |  | Met<br>(Yes/No)   | Demonstrated Experience<br>(Bidders to insert cross reference to<br>assigned resource project reference<br>number(s)) |
| M1 | <p>The Contractor must demonstrate that the proposed resource has the minimum number of years of experience specified below:</p> <p><b>For Level 2 resource categories the requirement is as follows:</b> The resource must have 5 years experience within the past 7 years of the draft TA issuance date executing at least 60% of the tasks enumerated at Article 3 of Annex A for the specific resource category identified in the draft TA.</p> <p><b>For Level 3 resource categories the requirement is as follows:</b> The resource must have 10 years experience within the past 15 years of the draft TA issuance date executing at least 60% of the tasks enumerated at Article 3 of Annex A for the specific resource category identified in the draft TA.</p> |                   |   |
| M2 | <p>The Contractor must demonstrate that the proposed resource's experience submitted under M1 includes the minimum number of months of experience specified below:</p> <p><b>For Level 2 resource categories the requirement is as follows:</b> The resource must have 2 years experience within the past 4 years of the draft TA issuance date using the technology(ies) identified as Essential (E).</p> <p><b>For Level 3 resource categories the requirement is as follows:</b> The resource must have 4 years experience within the past 8 years of the draft TA issuance date using the technology(ies) identified as Essential (E).</p>   |                   |   |

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### 3. RESOURCE POINT-RATED CRITERIA

| ID | Applicable or not?<br>(Client to insert "X" in boxes for the criteria that apply) | Point Rated Criteria   | Max Points      | Point Allocation Grid   | Bidder's response   |
|----|---|--|-----------------|---|---|
|    |   |  |                 |   | Demonstrated Experience<br>(Bidders to insert cross reference to assigned resource project reference number(s)) |
| R1 | <input type="checkbox"/>  | Points will be awarded for experience over and above the required in M1.   | 10              | <p><b>For Level 2 Resource:</b><br/>5+ to 6 years = 5 points<br/>6+ years = 10 points</p> <p><b>For Level 3 Resource:</b><br/>10+ to 11 years = 2 points<br/>11+ to 12 years = 4 points<br/>12+ to 13 years = 6 points<br/>13+ to 14 years = 8 points<br/>14+ years = 10 points</p> |   |
| R2 | <input type="checkbox"/>  | Points will be awarded for experience over and above the required in M2.   | 10 per element* | <p><b>For each Element:</b></p> <p><b>For Level 2 Resource:</b><br/>2+ to 3 years = 5 points<br/>3+ years = 10 points</p> <p><b>For Level 3 Resource:</b><br/>4+ to 5 years = 3 points<br/>5+ to 6 years = 7 points<br/>6+ years = 10 points</p>                                    |   |
| R3 | <input type="checkbox"/>  | The Contractor should demonstrate that the proposed resource has experience in each of the Technology (Element) identified as Desirable ("D"). | 10 per element* | <p><b>For each Element:</b></p> <p>0 to 1 year = 0 points<br/>1+ to 2 years = 2 points<br/>2+ to 3 years = 4 points<br/>3+ to 4 years = 6 points<br/>4+ to 5 years = 8 points<br/>5+ years = 10 points</p>  |   |

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|    |                          |  |                 |  |  |
|----|--------------------------|--|-----------------|--|--|
| R4 | <input type="checkbox"/> | The Contractor should demonstrate that the proposed resource holds the Certification(s) (Element) identified as Desirable ("D"). | 10 per element* | The proposed resource is a holder of the certification = 10 points |  |
|----|--------------------------|--|-----------------|--|--|

\*Evaluation Weights (for R1 to R4) are identified at time of issuance of a draft TA and accompanies each TA:

#### 4. EVALUATION GRID AND WEIGHTS

| ID                                      |  | Max Points | Points Achieved by Contractor (A) | Evaluation Weight (B)<br><i>(to be completed at tasking time)</i> | Weighted Result (A x B) |
|---|--|------------|-----------------------------------|---|-------------------------|
| R1                                      |  | 10         |                                   |   | 0                       |
| R2                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                         |
|   | Element 1                                | 10         |                                   |   | 0                       |
|   | Element 2                                | 10         |                                   |   | 0                       |
|   | Etc.                                     | 10         |                                   |   | 0                       |
| R3                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                         |
|   | Element 1                                | 10         |                                   |   | 0                       |
|   | Etc.                                     | 10         |                                   |   | 0                       |
| R4                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                         |
|   | Element 1                                | 10         |                                   |   | 0                       |
|   | Etc.                                     | 10         |                                   |   | 0                       |
| Total Weight <i>(must equal 100%)</i> : |  |            | 0%                                |   |                         |
| Total Score**:                          |  |            |                                   | 0%  |                         |

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\*\*Each proposed resource must meet the minimum pass mark of 70% to be deemed responsive.

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## IM Architect

TA #: \_\_\_\_\_

Contractor Name: \_\_\_\_\_

Proposed Resource Name: \_\_\_\_\_

Level:  3

### **1. RESOURCE TECHNOLOGY AND CERTIFICATION REQUIREMENTS**

#### **RESOURCE ESSENTIAL (E) DESIRABLE (D) TECHNOLOGY REQUIREMENT(S)**

|  |  |  |
|--|--|--|
| <input type="checkbox"/> BI software                     | <input type="checkbox"/> CA Erwin Data Modeler V9+ | <input type="checkbox"/> MS Office Suite (Word, Excel, PowerPoint) |
| <input type="checkbox"/> Data Warehouse                  | <input type="checkbox"/> IBM Data Studio V4+       | <input type="checkbox"/> MS Visio                                  |
| <input type="checkbox"/> IBM Cognos for Microsoft Office | <input type="checkbox"/> IBM PureData              | <input type="checkbox"/> Kimball Dimensional Methodology           |
| <input type="checkbox"/> IBM SPSS Modeler V14+           | <input type="checkbox"/> IBM DB2 V9+               | <input type="checkbox"/> Hadoop / Spark                            |
| <input type="checkbox"/> IBM Cognos                      | <input type="checkbox"/> SQL                       | <input type="checkbox"/> R   |
| <input type="checkbox"/> IBM InfoSphere Data Architect   | <input type="checkbox"/> XML                       | <input type="checkbox"/> Python                                    |
| <hr/>  |  |  |
| Azure / AWS  |  |  |

#### **RESOURCE DESIRABLE (D) CERTIFICATION REQUIREMENT(S)**

|  |   |
|--|---|
| <input type="checkbox"/> Certified Business Intelligence Professional (CBIP) | <input type="checkbox"/> Certified Business Analysis Professional™ (CBAP) |
|--|---|

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## 2. RESOURCE MANDATORY CRITERIA

| ID | Mandatory Criteria   | Bidder's response |   |
|----|--|-------------------|---|
|    |  | Met<br>(Yes/No)   | Demonstrated Experience<br>(Bidders to insert cross reference to<br>assigned resource project reference<br>number(s)) |
| M1 | <p>The Contractor must demonstrate that the proposed resource has the minimum number of years of experience specified below:</p> <p><b>For Level 2 resource categories the requirement is as follows:</b> The resource must have 5 years experience within the past 7 years of the draft TA issuance date executing at least 60% of the tasks enumerated at Article 3 of Annex A for the specific resource category identified in the draft TA.</p> <p><b>For Level 3 resource categories the requirement is as follows:</b> The resource must have 10 years experience within the past 15 years of the draft TA issuance date executing at least 60% of the tasks enumerated at Article 3 of Annex A for the specific resource category identified in the draft TA.</p> |                   |   |
| M2 | <p>The Contractor must demonstrate that the proposed resource's experience submitted under M1 includes the minimum number of months of experience specified below:</p> <p><b>For Level 2 resource categories the requirement is as follows:</b> The resource must have 2 years experience within the past 4 years of the draft TA issuance date using the technology(ies) identified as Essential (E).</p> <p><b>For Level 3 resource categories the requirement is as follows:</b> The resource must have 4 years experience within the past 8 years of the draft TA issuance date using the technology(ies) identified as Essential (E).</p>   |                   |   |

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**3. RESOURCE POINT-RATED CRITERIA**

| ID | Applicable or not?<br>(Client to insert "X" in boxes for the criteria that apply) | Point Rated Criteria   | Max Points      | Point Allocation Grid   | Bidder's response   |
|----|---|--|-----------------|---|---|
|    |   |  |                 |   | Demonstrated Experience<br>(Bidders to insert cross reference to assigned resource project reference number(s)) |
| R1 | <input type="checkbox"/>  | Points will be awarded for experience over and above the required in M1.   | 10              | <p><b>For Level 2 Resource:</b><br/>5+ to 6 years = 5 points<br/>6+ years = 10 points</p> <p><b>For Level 3 Resource:</b><br/>10+ to 11 years = 2 points<br/>11+ to 12 years = 4 points<br/>12+ to 13 years = 6 points<br/>13+ to 14 years = 8 points<br/>14+ years = 10 points</p> |   |
| R2 | <input type="checkbox"/>  | Points will be awarded for experience over and above the required in M2.   | 10 per element* | <p><b>For each Element:</b></p> <p><b>For Level 2 Resource:</b><br/>2+ to 3 years = 5 points<br/>3+ years = 10 points</p> <p><b>For Level 3 Resource:</b><br/>4+ to 5 years = 3 points<br/>5+ to 6 years = 7 points<br/>6+ years = 10 points</p>                                    |   |
| R3 | <input type="checkbox"/>  | The Contractor should demonstrate that the proposed resource has experience in each of the Technology (Element) identified as Desirable ("D"). | 10 per element* | <p><b>For each Element:</b></p> <p>0 to 1 year = 0 points<br/>1+ to 2 years = 2 points<br/>2+ to 3 years = 4 points<br/>3+ to 4 years = 6 points<br/>4+ to 5 years = 8 points<br/>5+ years = 10 points</p>  |   |

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|    |                          |  |                 |  |  |
|----|--------------------------|--|-----------------|--|--|
| R4 | <input type="checkbox"/> | The Contractor should demonstrate that the proposed resource holds the Certification(s) (Element) identified as Desirable ("D"). | 10 per element* | The proposed resource is a holder of the certification = 10 points |  |
|----|--------------------------|--|-----------------|--|--|

\*Evaluation Weights (for R1 to R4) are identified at time of issuance of a draft TA and accompanies each TA:

#### 4. EVALUATION GRID AND WEIGHTS

| ID                                      |  | Max Points | Points Achieved by Contractor (A) | Evaluation Weight (B)<br><i>(to be completed at tasking time)</i> | Weighted Result<br>(A x B) |
|---|--|------------|-----------------------------------|---|----------------------------|
| R1                                      |  | 10         |                                   |   | 0                          |
| R2                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                            |
|   | Element 1                                | 10         |                                   |   | 0                          |
|   | Element 2                                | 10         |                                   |   | 0                          |
|   | Etc.                                     | 10         |                                   |   | 0                          |
| R3                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                            |
|   | Element 1                                | 10         |                                   |   | 0                          |
|   | Etc.                                     | 10         |                                   |   | 0                          |
| R4                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                            |
|   | Element 1                                | 10         |                                   |   | 0                          |
|   | Etc.                                     | 10         |                                   |   | 0                          |
| Total Weight <b>(must equal 100%)</b> : |  |            | 0%                                |   |                            |
| Total Score**:                          |  |            |                                   | 0%  |                            |

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**\*\*Each proposed resource must meet the minimum pass mark of 70% to be deemed responsive.**

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## Enterprise Architect

TA #: \_\_\_\_\_

Contractor Name: \_\_\_\_\_

Proposed Resource Name: \_\_\_\_\_

Level:  3

### **1. RESOURCE TECHNOLOGY AND CERTIFICATION REQUIREMENTS**

#### **RESOURCE ESSENTIAL (E) DESIRABLE (D) TECHNOLOGY REQUIREMENT(S)**

|  |  |  |
|--|--|--|
| <input type="checkbox"/> BI software                     | <input type="checkbox"/> CA Erwin Data Modeler V9+ | <input type="checkbox"/> MS Office Suite (Word, Excel, PowerPoint) |
| <input type="checkbox"/> Data Warehouse                  | <input type="checkbox"/> IBM Data Studio V4+       | <input type="checkbox"/> MS Visio                                  |
| <input type="checkbox"/> IBM Cognos for Microsoft Office | <input type="checkbox"/> IBM PureData              | <input type="checkbox"/> Kimball Dimensional Methodology           |
| <input type="checkbox"/> IBM SPSS Modeler V14+           | <input type="checkbox"/> IBM DB2 V9+               | <input type="checkbox"/> IBM Infosphere Data Architect             |
| <input type="checkbox"/> IBM Cognos                      | <input type="checkbox"/> SQL                       | <input type="checkbox"/> XML                                       |

#### **RESOURCE DESIRABLE (D) CERTIFICATION REQUIREMENT(S)**

|  |  |   |
|--|--|---|
| <input type="checkbox"/> Certified Business Intelligence Professional (CBIP) | <input type="checkbox"/> IBM Certified Data Architect - Big Data | <input type="checkbox"/> IBM Certified Solution Developer - Information Analyzer V8.5 |
| <input type="checkbox"/> IBM Certified Database Associate Certifications     |  |   |

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## 2. RESOURCE MANDATORY CRITERIA

| ID | Mandatory Criteria   | Bidder's response |   |
|----|--|-------------------|---|
|    |  | Met<br>(Yes/No)   | Demonstrated Experience<br>(Bidders to insert cross reference to<br>assigned resource project reference<br>number(s)) |
| M1 | <p>The Contractor must demonstrate that the proposed resource has the minimum number of years of experience specified below:</p> <p><b>For Level 2 resource categories the requirement is as follows:</b> The resource must have 5 years experience within the past 7 years of the draft TA issuance date executing at least 60% of the tasks enumerated at Article 3 of Annex A for the specific resource category identified in the draft TA.</p> <p><b>For Level 3 resource categories the requirement is as follows:</b> The resource must have 10 years experience within the past 15 years of the draft TA issuance date executing at least 60% of the tasks enumerated at Article 3 of Annex A for the specific resource category identified in the draft TA.</p> |                   |   |
| M2 | <p>The Contractor must demonstrate that the proposed resource's experience submitted under M1 includes the minimum number of months of experience specified below:</p> <p><b>For Level 2 resource categories the requirement is as follows:</b> The resource must have 2 years experience within the past 4 years of the draft TA issuance date using the technology(ies) identified as Essential (E).</p> <p><b>For Level 3 resource categories the requirement is as follows:</b> The resource must have 4 years experience within the past 8 years of the draft TA issuance date using the technology(ies) identified as Essential (E).</p>   |                   |   |

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### 3. RESOURCE POINT-RATED CRITERIA

| ID | Applicable or not?<br>(Client to insert "X" in boxes for the criteria that apply) | Point Rated Criteria   | Max Points      | Point Allocation Grid   | Bidder's response   |
|----|---|--|-----------------|---|---|
|    |   |  |                 |   | Demonstrated Experience<br>(Bidders to insert cross reference to assigned resource project reference number(s)) |
| R1 | <input type="checkbox"/>  | Points will be awarded for experience over and above the required in M1.   | 10              | <p><b>For Level 2 Resource:</b><br/>5+ to 6 years = 5 points<br/>6+ years = 10 points</p> <p><b>For Level 3 Resource:</b><br/>10+ to 11 years = 2 points<br/>11+ to 12 years = 4 points<br/>12+ to 13 years = 6 points<br/>13+ to 14 years = 8 points<br/>14+ years = 10 points</p> |   |
| R2 | <input type="checkbox"/>  | Points will be awarded for experience over and above the required in M2.   | 10 per element* | <p><b>For each Element:</b></p> <p><b>For Level 2 Resource:</b><br/>2+ to 3 years = 5 points<br/>3+ years = 10 points</p> <p><b>For Level 3 Resource:</b><br/>4+ to 5 years = 3 points<br/>5+ to 6 years = 7 points<br/>6+ years = 10 points</p>                                    |   |
| R3 | <input type="checkbox"/>  | The Contractor should demonstrate that the proposed resource has experience in each of the Technology (Element) identified as Desirable ("D"). | 10 per element* | <p><b>For each Element:</b></p> <p>0 to 1 year = 0 points<br/>1+ to 2 years = 2 points<br/>2+ to 3 years = 4 points<br/>3+ to 4 years = 6 points<br/>4+ to 5 years = 8 points<br/>5+ years = 10 points</p>  |   |

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|    |                          |  |                 |  |  |
|----|--------------------------|--|-----------------|--|--|
| R4 | <input type="checkbox"/> | The Contractor should demonstrate that the proposed resource holds the Certification(s) (Element) identified as Desirable ("D"). | 10 per element* | The proposed resource is a holder of the certification = 10 points |  |
|----|--------------------------|--|-----------------|--|--|

\*Evaluation Weights (for R1 to R4) are identified at time of issuance of a draft TA and accompanies each TA:

#### 4. EVALUATION GRID AND WEIGHTS

| ID                                      |  | Max Points | Points Achieved by Contractor (A) | Evaluation Weight (B)<br><i>(to be completed at tasking time)</i> | Weighted Result<br>(A x B) |
|---|--|------------|-----------------------------------|---|----------------------------|
| R1                                      |  | 10         |                                   |   | 0                          |
| R2                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                            |
|   | Element 1                                | 10         |                                   |   | 0                          |
|   | Element 2                                | 10         |                                   |   | 0                          |
|   | Etc.                                     | 10         |                                   |   | 0                          |
| R3                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                            |
|   | Element 1                                | 10         |                                   |   | 0                          |
|   | Etc.                                     | 10         |                                   |   | 0                          |
| R4                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                            |
|   | Element 1                                | 10         |                                   |   | 0                          |
|   | Etc.                                     | 10         |                                   |   | 0                          |
| Total Weight <b>(must equal 100%)</b> : |  |            | 0%                                |   |                            |
| Total Score**:                          |  |            |                                   | 0%  |                            |

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\*\*Each proposed resource must meet the minimum pass mark of 70% to be deemed responsive.

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**Business Analyst**

TA #: \_\_\_\_\_

Contractor Name: \_\_\_\_\_

Proposed Resource Name: \_\_\_\_\_

Level:  2  
 3

**1. RESOURCE TECHNOLOGY AND CERTIFICATION REQUIREMENTS**

**RESOURCE ESSENTIAL (E) DESIRABLE (D) TECHNOLOGY REQUIREMENT(S)**

|  |   |  |
|--|---|--|
| <input type="checkbox"/> IBM SPSS Modeler V14+ | <input type="checkbox"/> Data Warehouse | <input type="checkbox"/> MS Office Suite (Word, Excel, PowerPoint) |
| <input type="checkbox"/> IBM Cognos            | <input type="checkbox"/> BI software    | <input type="checkbox"/> MS Visio                                  |

**RESOURCE DESIRABLE (D) CERTIFICATION REQUIREMENT(S)**

|  |   |
|--|---|
| <input type="checkbox"/> Certified Business Intelligence Professional (CBIP) | <input type="checkbox"/> Certified Business Analysis Professional™ (CBAP) |
|--|---|

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## 2. RESOURCE MANDATORY CRITERIA

| ID | Mandatory Criteria   | Bidder's response |   |
|----|--|-------------------|---|
|    |  | Met<br>(Yes/No)   | Demonstrated Experience<br>(Bidders to insert cross reference to<br>assigned resource project reference<br>number(s)) |
| M1 | <p>The Contractor must demonstrate that the proposed resource has the minimum number of years of experience specified below:</p> <p><b>For Level 2 resource categories the requirement is as follows:</b> The resource must have 5 years experience within the past 7 years of the draft TA issuance date executing at least 60% of the tasks enumerated at Article 3 of Annex A for the specific resource category identified in the draft TA.</p> <p><b>For Level 3 resource categories the requirement is as follows:</b> The resource must have 10 years experience within the past 15 years of the draft TA issuance date executing at least 60% of the tasks enumerated at Article 3 of Annex A for the specific resource category identified in the draft TA.</p> |                   |   |
| M2 | <p>The Contractor must demonstrate that the proposed resource's experience submitted under M1 includes the minimum number of months of experience specified below:</p> <p><b>For Level 2 resource categories the requirement is as follows:</b> The resource must have 2 years experience within the past 4 years of the draft TA issuance date using the technology(ies) identified as Essential (E).</p> <p><b>For Level 3 resource categories the requirement is as follows:</b> The resource must have 4 years experience within the past 8 years of the draft TA issuance date using the technology(ies) identified as Essential (E).</p>   |                   |   |

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### 3. RESOURCE POINT-RATED CRITERIA

| ID | Applicable or not?<br>(Client to insert "X" in boxes for the criteria that apply) | Point Rated Criteria   | Max Points      | Point Allocation Grid   | Bidder's response   |
|----|---|--|-----------------|---|---|
|    |   |  |                 |   | Demonstrated Experience<br>(Bidders to insert cross reference to assigned resource project reference number(s)) |
| R1 | <input type="checkbox"/>  | Points will be awarded for experience over and above the required in M1.   | 10              | <p><b>For Level 2 Resource:</b><br/>5+ to 6 years = 5 points<br/>6+ years = 10 points</p> <p><b>For Level 3 Resource:</b><br/>10+ to 11 years = 2 points<br/>11+ to 12 years = 4 points<br/>12+ to 13 years = 6 points<br/>13+ to 14 years = 8 points<br/>14+ years = 10 points</p> |   |
| R2 | <input type="checkbox"/>  | Points will be awarded for experience over and above the required in M2.   | 10 per element* | <p><b>For each Element:</b></p> <p><b>For Level 2 Resource:</b><br/>2+ to 3 years = 5 points<br/>3+ years = 10 points</p> <p><b>For Level 3 Resource:</b><br/>4+ to 5 years = 3 points<br/>5+ to 6 years = 7 points<br/>6+ years = 10 points</p>                                    |   |
| R3 | <input type="checkbox"/>  | The Contractor should demonstrate that the proposed resource has experience in each of the Technology (Element) identified as Desirable ("D"). | 10 per element* | <p><b>For each Element:</b></p> <p>0 to 1 year = 0 points<br/>1+ to 2 years = 2 points<br/>2+ to 3 years = 4 points<br/>3+ to 4 years = 6 points<br/>4+ to 5 years = 8 points<br/>5+ years = 10 points</p>  |   |

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|    |                          |  |                 |  |  |
|----|--------------------------|--|-----------------|--|--|
| R4 | <input type="checkbox"/> | The Contractor should demonstrate that the proposed resource holds the Certification(s) (Element) identified as Desirable ("D"). | 10 per element* | The proposed resource is a holder of the certification = 10 points |  |
|----|--------------------------|--|-----------------|--|--|

\*Evaluation Weights (for R1 to R4) are identified at time of issuance of a draft TA and accompanies each TA:

#### 4. EVALUATION GRID AND WEIGHTS

| ID                                      |  | Max Points | Points Achieved by Contractor (A) | Evaluation Weight (B)<br><i>(to be completed at tasking time)</i> | Weighted Result (A x B) |
|---|--|------------|-----------------------------------|---|-------------------------|
| R1                                      |  | 10         |                                   |   | 0                       |
| R2                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                         |
|   | Element 1                                | 10         |                                   |   | 0                       |
|   | Element 2                                | 10         |                                   |   | 0                       |
| R3                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                         |
|   | Element 1                                | 10         |                                   |   | 0                       |
|   | Etc.                                     | 10         |                                   |   | 0                       |
| R4                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                         |
|   | Element 1                                | 10         |                                   |   | 0                       |
|   | Etc.                                     | 10         |                                   |   | 0                       |
| Total Weight <i>(must equal 100%)</i> : |  |            | 0%                                |   |                         |

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|                |    |
|----------------|----|
| Total Score**: | 0% |
|----------------|----|

\*\*Each proposed resource must meet the minimum pass mark of 70% to be deemed responsive.

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**Technical Writer**

TA #: \_\_\_\_\_

Contractor Name: \_\_\_\_\_

Proposed Resource Name: \_\_\_\_\_

Level:  2  
 3

**1. RESOURCE TECHNOLOGY AND CERTIFICATION REQUIREMENTS**

**RESOURCE ESSENTIAL (E) DESIRABLE (D) TECHNOLOGY REQUIREMENT(S)**

- MS Office Suite (Word, Excel, Powerpoint)
- MS Visio

**RESOURCE DESIRABLE (D) CERTIFICATION REQUIREMENT(S)**

NON APPLICABLE

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## 2. RESOURCE MANDATORY CRITERIA

| ID | Mandatory Criteria   | Bidder's response |   |
|----|--|-------------------|---|
|    |  | Met<br>(Yes/No)   | Demonstrated Experience<br>(Bidders to insert cross reference to<br>assigned resource project reference<br>number(s)) |
| M1 | <p>The Contractor must demonstrate that the proposed resource has the minimum number of years of experience specified below:</p> <p><b>For Level 2 resource categories the requirement is as follows:</b> The resource must have 5 years experience within the past 7 years of the draft TA issuance date executing at least 60% of the tasks enumerated at Article 3 of Annex A for the specific resource category identified in the draft TA.</p> <p><b>For Level 3 resource categories the requirement is as follows:</b> The resource must have 10 years experience within the past 15 years of the draft TA issuance date executing at least 60% of the tasks enumerated at Article 3 of Annex A for the specific resource category identified in the draft TA.</p> |                   |   |
| M2 | <p>The Contractor must demonstrate that the proposed resource's experience submitted under M1 includes the minimum number of months of experience specified below:</p> <p><b>For Level 2 resource categories the requirement is as follows:</b> The resource must have 2 years experience within the past 4 years of the draft TA issuance date using the technology(ies) identified as Essential (E).</p> <p><b>For Level 3 resource categories the requirement is as follows:</b> The resource must have 4 years experience within the past 8 years of the draft TA issuance date using the technology(ies) identified as Essential (E).</p>   |                   |   |

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### 3. RESOURCE POINT-RATED CRITERIA

| ID | Applicable or not?<br>(Client to insert "X" in boxes for the criteria that apply) | Point Rated Criteria   | Max Points      | Point Allocation Grid   | Bidder's response   |
|----|---|--|-----------------|---|---|
|    |   |  |                 |   | Demonstrated Experience<br>(Bidders to insert cross reference to assigned resource project reference number(s)) |
| R1 | <input type="checkbox"/>  | Points will be awarded for experience over and above the required in M1.   | 10              | <p><b>For Level 2 Resource:</b><br/>5+ to 6 years = 5 points<br/>6+ years = 10 points</p> <p><b>For Level 3 Resource:</b><br/>10+ to 11 years = 2 points<br/>11+ to 12 years = 4 points<br/>12+ to 13 years = 6 points<br/>13+ to 14 years = 8 points<br/>14+ years = 10 points</p> |   |
| R2 | <input type="checkbox"/>  | Points will be awarded for experience over and above the required in M2.   | 10 per element* | <p><b>For each Element:</b></p> <p><b>For Level 2 Resource:</b><br/>2+ to 3 years = 5 points<br/>3+ years = 10 points</p> <p><b>For Level 3 Resource:</b><br/>4+ to 5 years = 3 points<br/>5+ to 6 years = 7 points<br/>6+ years = 10 points</p>                                    |   |
| R3 | <input type="checkbox"/>  | The Contractor should demonstrate that the proposed resource has experience in each of the Technology (Element) identified as Desirable ("D"). | 10 per element* | <p><b>For each Element:</b></p> <p>0 to 1 year = 0 points<br/>1+ to 2 years = 2 points<br/>2+ to 3 years = 4 points<br/>3+ to 4 years = 6 points<br/>4+ to 5 years = 8 points<br/>5+ years = 10 points</p>  |   |

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|    |                          |  |                 |  |  |
|----|--------------------------|--|-----------------|--|--|
| R4 | <input type="checkbox"/> | The Contractor should demonstrate that the proposed resource holds the Certification(s) (Element) identified as Desirable ("D"). | 10 per element* | The proposed resource is a holder of the certification = 10 points |  |
|----|--------------------------|--|-----------------|--|--|

\*Evaluation Weights (for R1 to R4) are identified at time of issuance of a draft TA and accompanies each TA:

#### 4. EVALUATION GRID AND WEIGHTS

| ID                                      |  | Max Points | Points Achieved by Contractor (A) | Evaluation Weight (B)<br><i>(to be completed at tasking time)</i> | Weighted Result (A x B) |
|---|--|------------|-----------------------------------|---|-------------------------|
| R1                                      |  | 10         |                                   |   | 0                       |
| R2                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                         |
|   | Element 1                                | 10         |                                   |   | 0                       |
|   | Element 2                                | 10         |                                   |   | 0                       |
|   | Etc.                                     | 10         |                                   |   | 0                       |
| R3                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                         |
|   | Element 1                                | 10         |                                   |   | 0                       |
|   | Etc.                                     | 10         |                                   |   | 0                       |
| R4                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                         |
|   | Element 1                                | 10         |                                   |   | 0                       |
|   | Etc.                                     | 10         |                                   |   | 0                       |
| Total Weight <i>(must equal 100%)</i> : |  |            | 0%                                |   |                         |
| Total Score**:                          |  |            |                                   | 0%  |                         |

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**\*\*Each proposed resource must meet the minimum pass mark of 70% to be deemed responsive.**

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### Project Executive

TA #: \_\_\_\_\_

Contractor Name: \_\_\_\_\_

Proposed Resource Name: \_\_\_\_\_

Level:  3

### 1. RESOURCE TECHNOLOGY AND CERTIFICATION REQUIREMENTS

#### RESOURCE ESSENTIAL (E) DESIRABLE (D) TECHNOLOGY REQUIREMENT(S)

MS Project

MS Visio

MS Office Suite (Word, Excel, PowerPoint)

#### RESOURCE DESIRABLE (D) CERTIFICATION REQUIREMENT(S)

Project Management Professional (PMP) or PRINCE2

Certified Associate in Project Management (CAPM)

Scheduling

Risk Management

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## 2. RESOURCE MANDATORY CRITERIA

| ID | Mandatory Criteria   | Bidder's response |   |
|----|--|-------------------|---|
|    |  | Met<br>(Yes/No)   | Demonstrated Experience<br>(Bidders to insert cross reference to<br>assigned resource project reference<br>number(s)) |
| M1 | <p>The Contractor must demonstrate that the proposed resource has the minimum number of years of experience specified below:</p> <p><b>For Level 2 resource categories the requirement is as follows:</b> The resource must have 5 years experience within the past 7 years of the draft TA issuance date executing at least 60% of the tasks enumerated at Article 3 of Annex A for the specific resource category identified in the draft TA.</p> <p><b>For Level 3 resource categories the requirement is as follows:</b> The resource must have 10 years experience within the past 15 years of the draft TA issuance date executing at least 60% of the tasks enumerated at Article 3 of Annex A for the specific resource category identified in the draft TA.</p> |                   |   |
| M2 | <p>The Contractor must demonstrate that the proposed resource's experience submitted under M1 includes the minimum number of months of experience specified below:</p> <p><b>For Level 2 resource categories the requirement is as follows:</b> The resource must have 2 years experience within the past 4 years of the draft TA issuance date using the technology(ies) identified as Essential (E).</p> <p><b>For Level 3 resource categories the requirement is as follows:</b> The resource must have 4 years experience within the past 8 years of the draft TA issuance date using the technology(ies) identified as Essential (E).</p>   |                   |   |

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### 3. RESOURCE POINT-RATED CRITERIA

| ID | Applicable or not?<br>(Client to insert "X" in boxes for the criteria that apply) | Point Rated Criteria   | Max Points      | Point Allocation Grid   | Bidder's response   |
|----|---|--|-----------------|---|---|
|    |   |  |                 |   | Demonstrated Experience<br>(Bidders to insert cross reference to assigned resource project reference number(s)) |
| R1 | <input type="checkbox"/>  | Points will be awarded for experience over and above the required in M1.   | 10              | <p><b>For Level 2 Resource:</b><br/>5+ to 6 years = 5 points<br/>6+ years = 10 points</p> <p><b>For Level 3 Resource:</b><br/>10+ to 11 years = 2 points<br/>11+ to 12 years = 4 points<br/>12+ to 13 years = 6 points<br/>13+ to 14 years = 8 points<br/>14+ years = 10 points</p> |   |
| R2 | <input type="checkbox"/>  | Points will be awarded for experience over and above the required in M2.   | 10 per element* | <p><b>For each Element:</b></p> <p><b>For Level 2 Resource:</b><br/>2+ to 3 years = 5 points<br/>3+ years = 10 points</p> <p><b>For Level 3 Resource:</b><br/>4+ to 5 years = 3 points<br/>5+ to 6 years = 7 points<br/>6+ years = 10 points</p>                                    |   |
| R3 | <input type="checkbox"/>  | The Contractor should demonstrate that the proposed resource has experience in each of the Technology (Element) identified as Desirable ("D"). | 10 per element* | <p><b>For each Element:</b></p> <p>0 to 1 year = 0 points<br/>1+ to 2 years = 2 points<br/>2+ to 3 years = 4 points<br/>3+ to 4 years = 6 points<br/>4+ to 5 years = 8 points<br/>5+ years = 10 points</p>  |   |

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|    |                          |  |                 |  |  |
|----|--------------------------|--|-----------------|--|--|
| R4 | <input type="checkbox"/> | The Contractor should demonstrate that the proposed resource holds the Certification(s) (Element) identified as Desirable ("D"). | 10 per element* | The proposed resource is a holder of the certification = 10 points |  |
|----|--------------------------|--|-----------------|--|--|

\*Evaluation Weights (for R1 to R4) are identified at time of issuance of a draft TA and accompanies each TA:

#### 4. EVALUATION GRID AND WEIGHTS

| ID                                      |  | Max Points | Points Achieved by Contractor (A) | Evaluation Weight (B)<br><i>(to be completed at tasking time)</i> | Weighted Result (A x B) |
|---|--|------------|-----------------------------------|---|-------------------------|
| R1                                      |  | 10         |                                   |   | 0                       |
| R2                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                         |
|   | Element 1                                | 10         |                                   |   | 0                       |
|   | Element 2                                | 10         |                                   |   | 0                       |
| R3                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                         |
|   | Element 1                                | 10         |                                   |   | 0                       |
|   | Etc.                                     | 10         |                                   |   | 0                       |
| R4                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                         |
|   | Element 1                                | 10         |                                   |   | 0                       |
|   | Etc.                                     | 10         |                                   |   | 0                       |
| Total Weight <i>(must equal 100%)</i> : |  |            | 0%                                |   |                         |
| Total Score**:                          |  |            |                                   | 0%  |                         |

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**\*\*Each proposed resource must meet the minimum pass mark of 70% to be deemed responsive.**

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**Project Coordinator**

TA #: \_\_\_\_\_

Contractor Name: \_\_\_\_\_

Proposed Resource Name: \_\_\_\_\_

Level:  3

**1. RESOURCE TECHNOLOGY AND CERTIFICATION REQUIREMENTS**

**RESOURCE ESSENTIAL (E) DESIRABLE (D) TECHNOLOGY REQUIREMENT(S)**

..... MS Project

MS Visio

MS Office Suite (Word, Excel, PowerPoint)

**RESOURCE DESIRABLE (D) CERTIFICATION REQUIREMENT(S)**

..... Certification in Project Management

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## 2. RESOURCE MANDATORY CRITERIA

| ID | Mandatory Criteria   | Bidder's response |   |
|----|--|-------------------|---|
|    |  | Met<br>(Yes/No)   | Demonstrated Experience<br>(Bidders to insert cross reference to<br>assigned resource project reference<br>number(s)) |
| M1 | <p>The Contractor must demonstrate that the proposed resource has the minimum number of years of experience specified below:</p> <p><b>For Level 2 resource categories the requirement is as follows:</b> The resource must have 5 years experience within the past 7 years of the draft TA issuance date executing at least 60% of the tasks enumerated at Article 3 of Annex A for the specific resource category identified in the draft TA.</p> <p><b>For Level 3 resource categories the requirement is as follows:</b> The resource must have 10 years experience within the past 15 years of the draft TA issuance date executing at least 60% of the tasks enumerated at Article 3 of Annex A for the specific resource category identified in the draft TA.</p> |                   |   |
| M2 | <p>The Contractor must demonstrate that the proposed resource's experience submitted under M1 includes the minimum number of months of experience specified below:</p> <p><b>For Level 2 resource categories the requirement is as follows:</b> The resource must have 2 years experience within the past 4 years of the draft TA issuance date using the technology(ies) identified as Essential (E).</p> <p><b>For Level 3 resource categories the requirement is as follows:</b> The resource must have 4 years experience within the past 8 years of the draft TA issuance date using the technology(ies) identified as Essential (E).</p>   |                   |   |

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### 3. RESOURCE POINT-RATED CRITERIA

| ID | Applicable or not?<br>(Client to insert "X" in boxes for the criteria that apply) | Point Rated Criteria   | Max Points      | Point Allocation Grid   | Bidder's response   |
|----|---|--|-----------------|---|---|
|    |   |  |                 |   | Demonstrated Experience<br>(Bidders to insert cross reference to assigned resource project reference number(s)) |
| R1 | <input type="checkbox"/>  | Points will be awarded for experience over and above the required in M1.   | 10              | <p><b>For Level 2 Resource:</b><br/>5+ to 6 years = 5 points<br/>6+ years = 10 points</p> <p><b>For Level 3 Resource:</b><br/>10+ to 11 years = 2 points<br/>11+ to 12 years = 4 points<br/>12+ to 13 years = 6 points<br/>13+ to 14 years = 8 points<br/>14+ years = 10 points</p> |   |
| R2 | <input type="checkbox"/>  | Points will be awarded for experience over and above the required in M2.   | 10 per element* | <p><b>For each Element:</b></p> <p><b>For Level 2 Resource:</b><br/>2+ to 3 years = 5 points<br/>3+ years = 10 points</p> <p><b>For Level 3 Resource:</b><br/>4+ to 5 years = 3 points<br/>5+ to 6 years = 7 points<br/>6+ years = 10 points</p>                                    |   |
| R3 | <input type="checkbox"/>  | The Contractor should demonstrate that the proposed resource has experience in each of the Technology (Element) identified as Desirable ("D"). | 10 per element* | <p><b>For each Element:</b></p> <p>0 to 1 year = 0 points<br/>1+ to 2 years = 2 points<br/>2+ to 3 years = 4 points<br/>3+ to 4 years = 6 points<br/>4+ to 5 years = 8 points<br/>5+ years = 10 points</p>  |   |

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|    |                          |  |                 |  |  |
|----|--------------------------|--|-----------------|--|--|
| R4 | <input type="checkbox"/> | The Contractor should demonstrate that the proposed resource holds the Certification(s) (Element) identified as Desirable ("D"). | 10 per element* | The proposed resource is a holder of the certification = 10 points |  |
|----|--------------------------|--|-----------------|--|--|

\*Evaluation Weights (for R1 to R4) are identified at time of issuance of a draft TA and accompanies each TA:

#### 4. EVALUATION GRID AND WEIGHTS

| ID                                      |  | Max Points | Points Achieved by Contractor (A) | Evaluation Weight (B)<br><i>(to be completed at tasking time)</i> | Weighted Result (A x B) |
|---|--|------------|-----------------------------------|---|-------------------------|
| R1                                      |  | 10         |                                   |   | 0                       |
| R2                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                         |
|   | Element 1                                | 10         |                                   |   | 0                       |
|   | Element 2                                | 10         |                                   |   | 0                       |
|   | Etc.                                     | 10         |                                   |   | 0                       |
| R3                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                         |
|   | Element 1                                | 10         |                                   |   | 0                       |
|   | Etc.                                     | 10         |                                   |   | 0                       |
| R4                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                         |
|   | Element 1                                | 10         |                                   |   | 0                       |
|   | Etc.                                     | 10         |                                   |   | 0                       |
| Total Weight <i>(must equal 100%)</i> : |  |            | 0%                                |   |                         |
| Total Score**:                          |  |            |                                   | 0%  |                         |

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\*\*Each proposed resource must meet the minimum pass mark of 70% to be deemed responsive.

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### Project Manager

TA #: \_\_\_\_\_

Contractor Name: \_\_\_\_\_

Proposed Resource Name: \_\_\_\_\_

Level:  2  
 3

### 1. RESOURCE TECHNOLOGY AND CERTIFICATION REQUIREMENTS

#### RESOURCE ESSENTIAL (E) DESIRABLE (D) TECHNOLOGY REQUIREMENT(S)

MS Project  MS Visio  MS Office Suite (Word, Excel, PowerPoint)

#### RESOURCE DESIRABLE (D) CERTIFICATION REQUIREMENT(S)

Project Management Professional (PMP) or PRINCE2  Certified Associate in Project Management (CAPM)  Scheduling

Risk Management

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## 2. RESOURCE MANDATORY CRITERIA

| ID | Mandatory Criteria   | Bidder's response |   |
|----|--|-------------------|---|
|    |  | Met<br>(Yes/No)   | Demonstrated Experience<br>(Bidders to insert cross reference to<br>assigned resource project reference<br>number(s)) |
| M1 | <p>The Contractor must demonstrate that the proposed resource has the minimum number of years of experience specified below:</p> <p><b>For Level 2 resource categories the requirement is as follows:</b> The resource must have 5 years experience within the past 7 years of the draft TA issuance date executing at least 60% of the tasks enumerated at Article 3 of Annex A for the specific resource category identified in the draft TA.</p> <p><b>For Level 3 resource categories the requirement is as follows:</b> The resource must have 10 years experience within the past 15 years of the draft TA issuance date executing at least 60% of the tasks enumerated at Article 3 of Annex A for the specific resource category identified in the draft TA.</p> |                   |   |
| M2 | <p>The Contractor must demonstrate that the proposed resource's experience submitted under M1 includes the minimum number of months of experience specified below:</p> <p><b>For Level 2 resource categories the requirement is as follows:</b> The resource must have 2 years experience within the past 4 years of the draft TA issuance date using the technology(ies) identified as Essential (E).</p> <p><b>For Level 3 resource categories the requirement is as follows:</b> The resource must have 4 years experience within the past 8 years of the draft TA issuance date using the technology(ies) identified as Essential (E).</p>   |                   |   |

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Amd. No. - N° de la modif.

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**3. RESOURCE POINT-RATED CRITERIA**

| ID | Applicable or not?<br>(Client to insert "X" in boxes for the criteria that apply) | Point Rated Criteria   | Max Points      | Point Allocation Grid   | Bidder's response   |
|----|---|--|-----------------|---|---|
|    |   |  |                 |   | Demonstrated Experience<br>(Bidders to insert cross reference to assigned resource project reference number(s)) |
| R1 | <input type="checkbox"/>  | Points will be awarded for experience over and above the required in M1.   | 10              | <p><b>For Level 2 Resource:</b><br/>5+ to 6 years = 5 points<br/>6+ years = 10 points</p> <p><b>For Level 3 Resource:</b><br/>10+ to 11 years = 2 points<br/>11+ to 12 years = 4 points<br/>12+ to 13 years = 6 points<br/>13+ to 14 years = 8 points<br/>14+ years = 10 points</p> |   |
| R2 | <input type="checkbox"/>  | Points will be awarded for experience over and above the required in M2.   | 10 per element* | <p><b>For each Element:</b></p> <p><b>For Level 2 Resource:</b><br/>2+ to 3 years = 5 points<br/>3+ years = 10 points</p> <p><b>For Level 3 Resource:</b><br/>4+ to 5 years = 3 points<br/>5+ to 6 years = 7 points<br/>6+ years = 10 points</p>                                    |   |
| R3 | <input type="checkbox"/>  | The Contractor should demonstrate that the proposed resource has experience in each of the Technology (Element) identified as Desirable ("D"). | 10 per element* | <p><b>For each Element:</b></p> <p>0 to 1 year = 0 points<br/>1+ to 2 years = 2 points<br/>2+ to 3 years = 4 points<br/>3+ to 4 years = 6 points<br/>4+ to 5 years = 8 points<br/>5+ years = 10 points</p>  |   |

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|    |                          |  |                 |  |  |
|----|--------------------------|--|-----------------|--|--|
| R4 | <input type="checkbox"/> | The Contractor should demonstrate that the proposed resource holds the Certification(s) (Element) identified as Desirable ("D"). | 10 per element* | The proposed resource is a holder of the certification = 10 points |  |
|----|--------------------------|--|-----------------|--|--|

\*Evaluation Weights (for R1 to R4) are identified at time of issuance of a draft TA and accompanies each TA:

#### 4. EVALUATION GRID AND WEIGHTS

| ID                                      |  | Max Points | Points Achieved by Contractor (A) | Evaluation Weight (B)<br><i>(to be completed at tasking time)</i> | Weighted Result (A x B) |
|---|--|------------|-----------------------------------|---|-------------------------|
| R1                                      |  | 10         |                                   |   | 0                       |
| R2                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                         |
|   | Element 1                                | 10         |                                   |   | 0                       |
|   | Element 2                                | 10         |                                   |   | 0                       |
|   | Etc.                                     | 10         |                                   |   | 0                       |
| R3                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                         |
|   | Element 1                                | 10         |                                   |   | 0                       |
|   | Etc.                                     | 10         |                                   |   | 0                       |
| R4                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                         |
|   | Element 1                                | 10         |                                   |   | 0                       |
|   | Etc.                                     | 10         |                                   |   | 0                       |
| Total Weight <b>(must equal 100%)</b> : |  |            | 0%                                |   |                         |
| Total Score**:                          |  |            |                                   | 0%  |                         |

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\*\*Each proposed resource must meet the minimum pass mark of 70% to be deemed responsive.

## COMMON-PS-SRCL#19



Government of Canada

Gouvernement du Canada

Contract Number / Numéro du contrat

47060-187626

Security Classification / Classification de sécurité  
UNCLASSIFIED

## SECURITY REQUIREMENTS CHECK LIST (SRCL)

## LISTE DE VÉRIFICATION DES EXIGENCES RELATIVES À LA SÉCURITÉ (LVERS)

## PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE

|  |   |  |   |
|--|---|--|---|
| 1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine   | Canada Border Services Agency (CBSA)                                      | 2. Branch or Directorate / Direction générale ou Direction                                     | Information, Science and Technology Branch (ISTB)   |
| 3. a) Subcontract Number / Numéro du contrat de sous-traitance   | 3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant |  |   |
| 4. Brief Description of Work / Brève description du travail<br>IT Professional Services Supply Chain to support the Agency's Enterprise Architecture, Information Management & Common Services division's IT requirement relating to Open Government and Data Analytics in the following functional areas: Business Analytics Competency Centre (BACC), Business Intelligence and Analytics Service (BIAS), Business Reporting Support, and Data Services Portfolio Manager. |   |  |   |
| 5. a) Will the supplier require access to Controlled Goods?<br>Le fournisseur aura-t-il accès à des marchandises contrôlées?   |   |  |   |
| 5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations?<br>Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques?   |   |  |   |
| 6. Indicate the type of access required / Indiquer le type d'accès requis  |   |  |   |
| 6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets?<br>Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS?<br>(Specify the level of access using the chart in Question 7. c)<br>(Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c)   |   |  |   |
| 6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted.<br>Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé.  |   |  |   |
| 6. c) Is this a commercial courier or delivery requirement with no overnight storage?<br>S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit?  |   |  |   |
| 7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès   |   |  |   |
| Canada <input checked="" type="checkbox"/>   | NATO / OTAN <input type="checkbox"/>                                      | Foreign / Étranger <input type="checkbox"/>  |   |
| 7. b) Release restrictions / Restrictions relatives à la diffusion   |   |  |   |
| No release restrictions<br>Aucune restriction relative à la diffusion <input checked="" type="checkbox"/>  | All NATO countries<br>Tous les pays de l'OTAN <input type="checkbox"/>    | No release restrictions<br>Aucune restriction relative à la diffusion <input type="checkbox"/> |   |
| Not releasable<br>À ne pas diffuser <input type="checkbox"/>   | Restricted to: / Limité à: <input type="checkbox"/>                       | Restricted to: / Limité à: <input type="checkbox"/>  | Restricted to: / Limité à: <input type="checkbox"/> |
| Specify country(ies): / Préciser le(s) pays :  | Specify country(ies): / Préciser le(s) pays :                             | Specify country(ies): / Préciser le(s) pays :  | Specify country(ies): / Préciser le(s) pays :       |
| 7. c) Level of information / Niveau d'information  |   |  |   |
| PROTECTED A<br>PROTÉGÉ A <input checked="" type="checkbox"/>   | NATO UNCLASSIFIED<br>NATO NON CLASSIFIÉ <input type="checkbox"/>          | PROTECTED A<br>PROTÉGÉ A <input type="checkbox"/>  |   |
| PROTECTED B<br>PROTÉGÉ B <input checked="" type="checkbox"/>   | NATO RESTRICTED<br>NATO DIFFUSION RESTREINTE <input type="checkbox"/>     | PROTECTED B<br>PROTÉGÉ B <input type="checkbox"/>  |   |
| PROTECTED C<br>PROTÉGÉ C <input checked="" type="checkbox"/>   | NATO CONFIDENTIAL<br>NATO CONFIDENTIEL <input type="checkbox"/>           | PROTECTED C<br>PROTÉGÉ C <input type="checkbox"/>  |   |
| CONFIDENTIAL<br>CONFIDENTIEL <input checked="" type="checkbox"/>   | NATO SECRET<br>NATO SECRET <input type="checkbox"/>                       | CONFIDENTIAL<br>CONFIDENTIEL <input type="checkbox"/>  |   |
| SECRET<br>SECRET <input checked="" type="checkbox"/>   | COSMIC TOP SECRET<br>COSMIC TRÈS SECRET <input type="checkbox"/>          | SECRET<br>SECRET <input type="checkbox"/>  |   |
| TOP SECRET<br>TRÈS SECRET <input type="checkbox"/>   |   | TOP SECRET<br>TRÈS SECRET <input type="checkbox"/>   |   |
| TOP SECRET (SIGINT)<br>TRÈS SECRET (SIGINT) <input type="checkbox"/>   |   | TOP SECRET (SIGINT)<br>TRÈS SECRET (SIGINT) <input type="checkbox"/>                           |   |

Government  
of CanadaGouvernement  
du Canada

## COMMON-PS-SRCL#19

Contract Number / Numéro du contrat

47060 - 187626

Security Classification / Classification de sécurité  
UNCLASSIFIED**PART A (continued) / PARTIE A (suite)**

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?

Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS?

If Yes, indicate the level of sensitivity:

Dans l'affirmative, indiquer le niveau de sensibilité :

9. Will the supplier require access to extremely sensitive INFOSEC information or assets?

Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate?

 No    Yes  
Non   Oui No    Yes  
Non   Oui

Short Title(s) of material / Titre(s) abrégé(s) du matériel :

Document Number / Numéro du document :

**PART B - PERSONNEL (SUPPLIER) / PARTIE B - PERSONNEL (FOURNISSEUR)**

10. a) Personnel security screening level required / Niveau de contrôle de la sécurité du personnel requis

 RELIABILITY STATUS  
COTE DE FIABILITÉ CONFIDENTIAL  
CONFIDENTIEL SECRET  
SECRET TOP SECRET  
TRÈS SECRET TOP SECRET- SIGINT  
TRÈS SECRET - SIGINT NATO CONFIDENTIAL  
NATO CONFIDENTIEL NATO SECRET  
NATO SECRET COSMIC TOP SECRET  
COSMIC TRÈS SECRET SITE ACCESS  
ACCÈS AUX EMPLACEMENTS

Special comments:

Commentaires spéciaux :

NOTE. If multiple levels of screening are identified, a Security Classification Guide must be provided.

REMARQUE. Si plusieurs niveaux de contrôle de sécurité sont requis, un guide de classification de la sécurité doit être fourni.

10. b) May unscreened personnel be used for portions of the work?

Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail?

 No    Yes  
Non   Oui

If Yes, will unscreened personnel be escorted?

Dans l'affirmative, le personnel en question sera-t-il escorté?

 No    Yes  
Non   Oui**PART C - SAFEGUARDS (SUPPLIER) / PARTIE C - MESURES DE PROTECTION (FOURNISSEUR)**

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

11. a) Will the supplier be required to receive and store PROTECTED and/or CLASSIFIED information or assets on its site or premises?

Le fournisseur sera-t-il tenu de recevoir et d'entreposer sur place des renseignements ou des biens PROTÉGÉS et/ou CLASSIFIÉS?

 No    Yes  
Non   Oui

11. b) Will the supplier be required to safeguard COMSEC information or assets?

Le fournisseur sera-t-il tenu de protéger des renseignements ou des biens COMSEC?

 No    Yes  
Non   Oui

## PRODUCTION

11. c) Will the production (manufacture, and/or repair and/or modification) of PROTECTED and/or CLASSIFIED material or equipment occur at the supplier's site or premises?

Les installations du fournisseur serviront-elles à la production (fabrication et/ou réparation et/ou modification) de matériel PROTÉGÉ et/ou CLASSIFIÉ?

 No    Yes  
Non   Oui

## INFORMATION TECHNOLOGY (IT) MEDIA / SUPPORT RELATIF À LA TECHNOLOGIE DE L'INFORMATION (TI)

11. d) Will the supplier be required to use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data?

Le fournisseur sera-t-il tenu d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou des données PROTÉGÉS et/ou CLASSIFIÉS?

 No    Yes  
Non   Oui

11. e) Will there be an electronic link between the supplier's IT systems and the government department or agency?

Disposera-t-on d'un lien électronique entre le système informatique du fournisseur et celui du ministère ou de l'agence gouvernementale?

 No    Yes  
Non   Oui

Government  
of CanadaGouvernement  
du Canada

## COMMON-PS-SRCL#19

Contract Number / Numéro du contrat

47060-187626

Security Classification / Classification de sécurité

UNCLASSIFIED

**PART C - (continued) / PARTIE C - (suite)**

For users completing the form manually use the summary chart below to indicate the category(ies) and level(s) of safeguarding required at the supplier's site(s) or premises.

Les utilisateurs qui remplissent le formulaire manuellement doivent utiliser le tableau récapitulatif ci-dessous pour indiquer, pour chaque catégorie, les niveaux de sauvegarde requis aux installations du fournisseur.

For users completing the form online (via the Internet), the summary chart is automatically populated by your responses to previous questions.  
Dans le cas des utilisateurs qui remplissent le formulaire en ligne (par Internet), les réponses aux questions précédentes sont automatiquement saisies dans le tableau récapitulatif.

**SUMMARY CHART / TABLEAU RÉCAPITULATIF**

| Category<br>Catégorie  | PROTECTED<br>PROTÉGÉ |   |   | CLASSIFIED<br>CLASSIFIÉ      |        |                                 | NATO   |                      |                |   | COMSEC               |   |   |   |                              |        |                                 |
|--|----------------------|---|---|------------------------------|--------|---------------------------------|--|----------------------|----------------|---|----------------------|---|---|---|------------------------------|--------|---------------------------------|
|  | A                    | B | C | CONFIDENTIAL<br>CONFIDENTIEL | SECRET | TOP<br>SECRET<br>TRÈS<br>SECRET | NATO<br>RESTRICTED<br>NATO<br>DIFFUSION<br>RESTRÉNTE | NATO<br>CONFIDENTIAL | NATO<br>SECRET | COSMIC<br>TOP<br>SECRET<br>CONFIDENTIAL<br>TRÈS<br>SECRET | PROTECTED<br>PROTÉGÉ | A | B | C | CONFIDENTIAL<br>CONFIDENTIEL | SECRET | TOP<br>SECRET<br>TRÈS<br>SECRET |
| Information / Assets<br>Renseignements / Biens<br>Production |                      |   |   |                              |        |                                 |  |                      |                |   |                      |   |   |   |                              |        |                                 |
| IT Media /<br>Support TI<br>IT Média /<br>Support TI         |                      |   |   |                              |        |                                 |  |                      |                |   |                      |   |   |   |                              |        |                                 |
| Liens électroniques  |                      |   |   |                              |        |                                 |  |                      |                |   |                      |   |   |   |                              |        |                                 |

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED?

La description du travail visé par la présente LVERS est-elle de nature PROTEGEE et/ou CLASSIFIÉE?

 No Yes

Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".

Dans l'affirmative, classifier le présent formulaire en indiquant le niveau de sécurité dans la case intitulée  
« Classification de sécurité » au haut et au bas du formulaire.

12. b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED?

La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE?

 No Yes

Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments).

Dans l'affirmative, classifier le présent formulaire en indiquant le niveau de sécurité dans la case intitulée  
« Classification de sécurité » au haut et au bas du formulaire et indiquer qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).

## COMMON-PS-SRCL#19

Government of Canada  
Gouvernement du Canada

|  |
|--|
| Contract Number / Numéro du contrat                  |
| <b>47060-187626</b>                                  |
| Security Classification / Classification de sécurité |
| UNCLASSIFIED   |

**PART D - AUTHORIZATION / PARTIE D - AUTORISATION**

13. Organization Project Authority / Chargé de projet de l'organisme

|   |                                   |  |
|---|-----------------------------------|--|
| Name (print) - Nom (en lettres moulées) | Title - Titre                     | Signature  |
| <i>Louis Albert</i>                     | <i>Director ISPB</i>              |  |
| Telephone No. - N° de téléphone         | Facsimile No. - N° de télécopieur | E-mail address - Adresse courriel  |
| 343-291-6007                            |                                   | <i>Louis.MA@tbs-sct.gc.ca</i>  |
| Date                                    |                                   |  |
| Feb 5, 2018                             |                                   |  |

14. Organization Security Authority / Responsable de la sécurité de l'organisme

|   |                                   |   |
|---|-----------------------------------|---|
| Name (print) - Nom (en lettres moulées) | Title - Titre                     | Signature   |
| <i>AHMED SALAMI</i>                     | <i>Manager, HSC Security</i>      |  |
| Telephone No. - N° de téléphone         | Facsimile No. - N° de télécopieur | E-mail address - Adresse courriel   |
| 343-291-6007                            |                                   | <i>ahmed.sch@tbs-sct.gc.ca</i>  |
| Date                                    |                                   |   |
| 2018-02-06                              |                                   |   |

15. Are there additional instructions (e.g. Security Guide, Security Classification Guide) attached?

Des instructions supplémentaires (p. ex. Guide de sécurité, Guide de classification de la sécurité) sont-elles jointes?

 No  
 Non  
 Yes  
 Oui

16. Procurement Officer / Agent d'approvisionnement

|   |                                   |   |
|---|-----------------------------------|---|
| Name (print) - Nom (en lettres moulées)   | Title - Titre                     | Signature   |
| <i>Francis Lapalme</i>  | <i>Supply Specialist</i>          |    |
| Telephone No. - N° de téléphone   | Facsimile No. - N° de télécopieur | E-mail address - Adresse courriel   |
| 613-858-9912  |                                   | <i>francis.lapalme@tpsgc-pwgsc.gc.ca</i>  |
| Date  |                                   |   |
| April 10, 2018  |                                   |   |
| 17. Contracting Security Authority / Autorité contractante en matière de sécurité |                                   |   |
| Name (print) - Nom (en lettres moulées)   | Title - Titre                     | Signature   |
|   |                                   |  |
| Telephone No. - N° de téléphone   | Facsimile No. - N° de télécopieur | E-mail address - Adresse courriel   |
|   |                                   |   |
| Date  |                                   |   |
|   |                                   |   |

Jacques Saumur  
 Contract Security Officer  
 Contracts Security Division|Division des contrats sécurité /  
 Contract Security Program|Programme de sécurité des contrats /  
 Public Services and Procurement Canada|Services publics et Approvisionnement Canada  
 Jacques.Saumur@tpsgc-pwgsc.gc.ca  
 Telephone | Téléphone 613-948-1732  
 Facsimile | Télécopieur 613-948-1712

Digitally signed by Lapalme,  
 Francis  
 Date: 2018.08.29 11:28:07 -04'00'  
 Digitally signed by Saumur, Jacques O  
 DN: cn=CA,pwgc.gc.ca,PWGSC(TPSGC),  
 ou=Saumur, Jacques O  
 Date: 2017.02.02 13:38:31 -05'00'



Public Works and  
Government Services  
Canada

Travaux publics et  
Services gouvernementaux  
Canada

Purchasing Office - Bureau des achats:  
Informatics Professional Services - EL  
Division/Services professionnels en informatique -  
division EL  
Terrasses de la Chaudière 4th Floor  
10 Wellington Street  
Gatineau  
Québec  
K1A 0S5

## CONTRACT AMENDMENT MODIFICATION AU CONTRAT

The referenced document is hereby amended: unless otherwise indicated, all other terms and conditions of the contract remain the same.

Ce document est par la présente modifié: sauf indication contraire, les modalités du contrat demeurent les mêmes.

The Vendor/Firm hereby accepts/acknowledges this amendment.

Le fournisseur/entrepreneur accepte la présente modification/est accusé réception.

Feb 25, 2019

Signature **B. Krach**  
Name, title of person authorized to sign (type or print)  
Nom et titre du signataire autorisé (taper ou imprimer)

Return signed copy forthwith  
Prière de retourner une copie dûment signée immédiatement

### Comments - Commentaires

#### Vendor/Firm Name and Address

Raison sociale et adresse du  
fournisseur/de l'entrepreneur

129925947PG0001  
S.I. SYSTEMS ULC  
170 Laurier Avenue West  
Suite 300  
Ottawa  
Ontario  
K1P5V5  
Canada

|  |   |
|--|---|
| <b>Title - Sujet</b><br>ITSSC (Workstream 1)   |   |
| <b>Contract No. - N° du contrat</b><br>47060-187626/001/EL   | <b>Amendment No. - N° Modif</b><br>001              |
| <b>Client Reference No. - N° de référence du client</b><br>1000337626  | <b>Date</b><br>2019-02-25                           |
| <b>Requisition Reference No. - N° de la demande</b><br>47060-187626  |   |
| <b>File No. - N° de dossier</b><br>632el.47060-187626  | <b>CCC No./N° CCC - FMS No./N° VME</b>              |
| <b>Financial Codes</b><br>Code(s) financier(s)   |   |
| <b>GST/HST</b><br><b>TPS/TVH</b>   |   |
| <b>F.O.B. - F.A.B.</b><br>Other - Autre Specified Herein - Précisé dans les présentes  |   |
| <b>GST/HST - TPS/TVH</b><br>See Herein - Voir ci-inclus  | <b>Duty - Droits</b><br>See Herein - Voir ci-inclus |
| <b>Destination - of Goods, Services, and Construction:</b><br><b>Destination - des biens, services et construction:</b><br>TECHNOLOGY /TECHNOLOGIE<br>NC REGION<br>Ottawa ON |   |
| <b>Invoices - Original and two copies to be sent to:</b><br><b>Factures - Envoyer l'original et deux copies à:</b><br>TECHNOLOGY /TECHNOLOGIE<br>NC REGION<br>Ottawa ON      |   |
| <b>Address Enquiries to: - Adresser toutes questions à:</b><br>Lapalme, Francis  |   |
| <b>Buyer Id - Id de l'acheteur</b><br>632el  |   |
| <b>Telephone No. - N° de téléphone</b><br>(613) 858-9912 ( )   | <b>FAX No. - N° de FAX</b><br>( ) -                 |
| <b>Increase (Decrease) - Augmentation (Diminution)</b><br>\$0.00   |   |
| <b>Revised estimated cost</b><br>Coût révisé estimatif<br>\$3,591,436.20   | <b>Currency Type - Genre de devise</b><br>CAD       |
| <b>For the Minister - Pour le Ministre</b><br><b>Lapalme, Francis</b>  |   |
| Digitally signed by Lapalme,<br>Francis<br>Date: 2019.02.25 14:15:51 -05'00'   |   |

Contract Number:  
47060-187626/001/EL

Amendment Number:  
001

Buyer ID:  
632EL

---

## AMENDMENT 001

This Contract Amendment is issued to change the Contractor's legal name.

---

**1. At Article 1. Requirement of the Contract, amend as follows:**

**DELETE subarticle (a) in its entirety.**

**INSERT:**

(a) S.I. Systems ULC (the "Contractor") agrees to supply to the Client the services described in the Contract, including the Statement of Work, in accordance with, and at the prices set out in, the Contract. This includes providing professional services as and when requested by Canada, to one or more locations to be designated by Canada, excluding any locations in areas subject to any of the Comprehensive Land Claims Agreements.

---

***ALL OTHER TERMS AND CONDITIONS OF THE CONTRACT REMAIN UNCHANGED.***



Public Works and  
Government Services  
Canada

Travaux publics et  
Services gouvernementaux  
Canada

## TASK AUTHORIZATION FORM FORMULAIRE D'AUTORISATION DE TÂCHES

**PART 1** (completed by the Technical/Project Authority) / **PARTIE 1** (complété par le Responsable technique / Chargé du projet)

|  |  |                               |                                      |                                       |
|--|--|-------------------------------|--------------------------------------|---------------------------------------|
| <b>A. General Information / Informations générales</b>               |  |                               |                                      |                                       |
| Contract Number / Numéro du contrat :                                |  | 47060-187626/001/EL           |                                      |                                       |
| Contractor Name / Nom du Contracteur :                               |  | S.i. Systems Ltd.             |                                      |                                       |
| Task Authorization (TA) No.<br>N° de l'autorisation de tâches (AT) : |  | STOT No.<br>N° de l'EDT :     | Financial Coding<br>Code financier : | Date of Issuance<br>Date d'émission : |
| 2020000333   |  | 3 Project Executives, Level 3 | 1910 700 00                          | 2019-05-29                            |
|  |  |                               |                                      | 2019-06-11                            |

|  |  |  |  |  |
|--|--|--|--|--|
| <b>B. For Amendments Only / Aux fins de modification seulement</b> |  |  |  |  |
| Amendment No. / N° de la modification :                            |  |  |  |  |
| Reason for the Amendment / Raison pour la modification :           |  |  |  |  |

|   |  |   |   |   |
|---|--|---|---|---|
| <b>C. TA Requirements / Exigences relatives à l'AT</b>  |  |   |   |   |
| Required Resource(s) / Ressource(s) requise(s)  |  |   |   |   |
| Category and Level<br>Catégorie et Niveau   |  | Estimated Level of<br>Effort (days) / Niveau<br>d'effort estimatif<br>(jours) | Linguistic Profile / Profil<br>linguistique | Required Level(s) of<br>Security /<br>Niveau(x) de sécurité<br>requis |
| Project Executive Level 3   |  |   | English                                     | Secret  |
| Project Executive Level 3   |  |   | English                                     | Secret  |
| Statement of Work (tasks, deliverables, reports, etc.) / Énoncé des travaux (tâches, livrables, rapports, etc.) |  |   |   |   |
| See attached / Voir pièce jointe  |  |   |   |   |

|  |  |  |   |  |
|--|--|--|---|--|
| Period of Services / Période de service:   |  |  |   |  |
| Initial Start Date / Date de début initiale :  |  | 07-Aug-2019                                  | Initial End Date / Date de fin initiale : |  |
| Extented End Date (See Reason for the Amendment) / Date de fin prolongée (voir Raison pour la modification): |  |  |   |  |
| <input type="checkbox"/> Option To Extend Initial End Date / Option pour prolonger la date de fin initiale   |  |  |   |  |
| Optional End Date(s) / Date(s) de fin optionnelle(s)   |  | Status / Statut                              |   |  |
| 03-Sep-2021  |  | <input type="radio"/> In Effect / en vigueur |   |  |
| 03-Sep-2022  |  | <input type="radio"/> In Effect / en vigueur |   |  |
| 03-Sep-2023  |  | <input type="radio"/> In Effect / en vigueur |   |  |
| Travel Requirement(s) / Exigence(s) de voyage :  |  | n/a  |   |  |
| Work Location(s) / Lieu(x) de travail :  |  | Vanier Towers, 333 North River Road Ontario  |   |  |

**PART 2** (completed by the Contractor and/or the Technical/Project Authority) / **PARTIE 2** (complété par le Contracteur et/ou le Responsable technique / Chargé du projet)

|  |  |   |  |                                 |  |
|--|--|---|--|---------------------------------|--|
| <b>Contractor Resource(s) and Estimated Cost / Ressource(s) du Contracteur et Coût total estimatif</b>   |  |   |  |                                 |  |
| Note: once approved, only the following resources may provide services under this TA. / Note: une fois approuvée, seules les ressources suivantes peuvent fournir des services sous la présente AT |  |   |  |                                 |  |
| Name / Nom<br>Category and Level / Catégorie et Niveau   |  | PWGSC Security File No. / N° du dossier de sécurité TPSGC | Linguistic Profile / Profil linguistique | Per Diem Rate / Taux journalier | Estimated Level of Effort (days) / Niveau d'effort estimatif (jours) |
| 1 Project Executive Level 3  |  | 1029986-1 HQ  | English                                  |                                 | \$249,150.00   |

1 of 2

|  |         |   |                                     |   |
|--|---------|---|-------------------------------------|---|
| / Project Executive Level 3  | 1029967 | English   |                                     | \$249,150.00  |
|  |         | Estimated Cost / Coût estimatif   |                                     | \$498,300.00  |
|  |         | Total Estimated Travel and Living Cost / Coût total estimatif de voyage et de vie |                                     | \$0.00  |
|  |         | Total Estimated Cost / Coût total estimatif                                       |                                     | \$498,300.00  |
| Check applicable Basis of Payment /<br>Cocher la Base de Paiement applicable : |         | Maximum Price /<br>Prix Maximum :   | <input checked="" type="checkbox"/> | Firm Price /<br>Prix Ferme : <input type="checkbox"/> |

### PART 3 - TA APPROVAL BY CANADA / PARTIE 3 - APPROBATION DE L'AT PAR LE CANADA

By signing this TA, the Technical Authority, the representative from the SPMMD of CBSA and/or the PWGSC Contracting Authority certify(es) that the content of this TA is in accordance with the conditions of the Contract.

The client's authorization limit is \$250,000. When the value of a TA and its amendments (excluding Applicable Taxes) is in excess of this limit, the TA must be signed by the authorized client and forwarded to the PWGSC Contracting Authority for authorization.

En apposant sa signature sur l'AT, l'autorité technique, le représentant de la DAGBS de l'ASFC et/ou l'autorité contractante de TPSGC atteste(nt) que le contenu de cette AT est conforme aux conditions du contrat.

La limite d'autorisation du client est \$250,000. Lorsque la valeur de l'AT et ses modifications (excluant les taxes applicables) dépasse cette limite, l'AT doit être signée par le client autorisé et transmise à l'autorité contractante de TPSGC pour autorisation.

Daphne Bond  
Al Shereh on behalf  
Name of Technical Authority / Nom de l'autorité technique  
Signature

2019-08-01  
Date

Francis Lapalme  
Francis  
Name of Contracting Authority / Nom de l'autorité contractante  
Signature  
Digitally signed by Lapalme,  
Francis  
Date: 2019.08.02 12:05:35 -04'00'

Jordan Komery  
Name of the representative from the SPMMD of CBSA /  
Nom d'un représentant de la DAGBS de l'ASFC  
KOMERY JORDAN  
Digitally signed by KOMERY JORDAN  
Date: 2019.08.01 08:36:36 -04'00'  
Signature

### PART 4 - CONTRACTOR SIGNATURE / PARTIE 4 - SIGNATURE DU CONTRACTEUR

|  |           |               |
|--|-----------|---------------|
| KANUPRIYA JAGDEV, ACCOUNT EXECUTIVE  | Signature | 8 August 2019 |
| Name and Title of individual authorized to sign on behalf of the Contractor /<br>Nom et titre Signature de la personne autorisée à signer au nom de l'entrepreneur |           | Date          |

## TASK AUTHORIZATION FORM FORMULAIRE D'AUTORISATION DE TÂCHES

**PART 1** (completed by the Technical Project Authority) / **PARTIE 1** (complété par le Responsable technique / Chargé du projet)

|  |                               |                           |                                      |                                       |
|--|-------------------------------|---------------------------|--------------------------------------|---------------------------------------|
| <b>A. General Information / Informations générales</b>               |                               |                           |                                      |                                       |
| Contract Number / Numéro du contrat :                                |                               | 47060-187626/001/EL       |                                      |                                       |
| Contractor Name / Nom du Contracteur :                               |                               | S.I. Systems Ltd.         |                                      |                                       |
| Task Authorization (TA) No.<br>Nº de l'autorisation de tâches (AT) : |                               | STOT No.<br>Nº de l'EDT : | Financial Coding<br>Code financier : | Date of Issuance<br>Date d'émission : |
| 2020000333   | 3 Project Executives, Level 3 | 1910 700 00               | 2019-05-29                           | 2019-06-11                            |

|  |  |  |  |  |
|--|--|--|--|--|
| <b>B. For Amendments Only / Aux fins de modification seulement</b>   |  |  |  |  |
| Amendment No. / Nº de la modification : 1  |  |  |  |  |
| Reason for the Amendment / Raison pour la modification : This amendment is raised add 3 additional resources and add level of effort |  |  |  |  |

| <b>C. TA Requirements / Exigences relatives à l'AT</b> |  |  |   |
|--|--|--|---|
| Required Resource(s) / Ressource(s) requise(s)         |  |  |   |
| Category and Level<br>Catégorie et Niveau              | Estimated Level of Effort (days) / Niveau d'effort estimatif (jours) | Linguistic Profile / Profil linguistique | Required Level(s) of Security /<br>Niveau(x) de sécurité requis |
| Project Executive Level 3                              |  | English                                  | Secret  |
| Project Executive Level 3                              |  | English                                  | Secret  |
| Project Executive Level 3                              |  | English                                  | Secret  |
| Project Executive Level 3                              |  | English                                  | Secret  |
| Project Executive Level 3                              |  | English                                  | Secret  |

|   |  |
|---|--|
| Statement of Work (tasks, deliverables, reports, etc.) / Énoncé des travaux (tâches, livrables, rapports, etc.) |  |
| See attached / Voir pièce jointe  |  |

|  |             |
|--|-------------|
| Period of Services / Période de service:   |             |
| Initial Start Date / Date de début initiale :  | 07-Aug-2019 |
| Initial End Date / Date de fin initiale :  | 03-Sep-2020 |
| Extended End Date (See Reason for the Amendment) / Date de fin prolongée (voir Raison pour la modification): |             |
| <input type="checkbox"/> Option To Extend Initial End Date / Option pour prolonger la date de fin initiale   |             |
| Optional End Date(s) / Date(s) de fin optionnelle(s)   |             |
| 03-Sep-2021  |             |
| <input type="radio"/> In Effect / en vigueur   |             |
| 03-Sep-2022  |             |
| <input type="radio"/> In Effect / en vigueur   |             |
| 03-Sep-2023  |             |
| <input type="radio"/> In Effect / en vigueur   |             |
| Travel Requirement(s) / Exigence(s) de voyage :  |             |
| n/a  |             |

|   |                                     |         |
|---|-------------------------------------|---------|
| Work Location(s) / Lieu(x) de travail : | Vanier Towers, 333 North River Road | Ontario |
|---|-------------------------------------|---------|

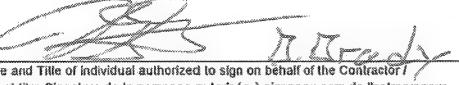
**PART 2** (compiled by the Contractor and/or the Technical Project Authority) / **PARTIE 2** (complété par le Contracteur et/ou la Responsabilité technique / Chargé du projet)

| <b>Contractor Resource(s) and Estimated Cost / Ressource(s) du Contracteur et Coût total estimatif</b>   |   |  |                                   |  |   |
|--|---|--|-----------------------------------|--|---|
| <small>Note: once approved, only the following resources may provide services under this TA. // Note : une fois approuvée, seules les ressources suivantes peuvent fournir des services sous la présente AT.</small> |   |  |                                   |  |   |
| Name / Nom<br>Category and Level / Catégorie et Niveau   | PWGSC Security File No. / N° du dossier de sécurité TPSGC | Linguistic Profile / Profil linguistique | Per Diem Rate / Taux journalier   | Estimated Level of Effort (days) / Niveau d'effort estimatif (jours) | Total Estimated Cost / Coût total estimatif                                       |
| / Project Executive Level 3  | 1029986-1 HQ  | English                                  |                                   |  | \$249,150.00  |
| / Project Executive Level 3  | 1029967   | English                                  |                                   |  | \$249,150.00  |
| / Project Executive Level 3  | 95553678  | English                                  |                                   |  | \$156,285.00  |
| Project Executive Level 3  | 1031505   | English                                  |                                   |  | \$156,285.00  |
| / Project Executive Level 3  | 96190676  | English                                  |                                   |  | \$156,285.00  |
|  |   |  |                                   |  | Estimated Cost / Coût estimatif   |
|  |   |  |                                   |  | \$967,155.00  |
|  |   |  |                                   |  | Total Estimated Travel and Living Cost / Coût total estimatif de voyage et de vie |
|  |   |  |                                   |  | \$0.00  |
|  |   |  |                                   |  | Total Estimated Cost / Coût total estimatif                                       |
|  |   |  |                                   |  | \$967,155.00  |
| Check applicable Basis of Payment /<br>Cocher la Base de Paiement applicable :   |   |  | Maximum Price /<br>Prix Maximum : | <input checked="" type="checkbox"/>                                  | Firm Price /<br>Prix Ferme :  |
|  |   |  |                                   | <input type="checkbox"/>   |   |

**PART 3 - TA APPROVAL BY CANADA / PARTIE 3 - APPROBATION DE L'AT PAR LE CANADA**

|  |   |
|--|---|
| By signing this TA, the Technical Authority, the representative from the SPMMD of CBSA and/or the PWGSC Contracting Authority certify(ies) that the content of this TA is in accordance with the conditions of the Contract.   | En apposant sa signature sur l'AT, l'autorité technique, le représentant de la DAGBS de l'ASFC et/ou l'autorité contractante de TPSGC atteste(n) que le contenu de cette AT est conforme aux conditions du contrat.   |
| The client's authorization limit is \$250,000. When the value of a TA and its amendments (excluding Applicable Taxes) is in excess of this limit, the TA must be signed by the authorized client and forwarded to the PWGSC Contracting Authority for authorization. | La limite d'autorisation du client est \$250,000. Lorsque la valeur de l'AT et ses modifications (excluant les taxes applicables) dépasse cette limite, l'AT doit être signée par le client autorisé et transmise à l'autorité contractante de TPSGC pour autorisation. |
| Daphne Bond  |   |
| Name of Technical Authority / Nom de l'autorité technique  | Date  |
|   | 2019-11-4   |
| Signature  | Signature   |
| Roxanne Montpetit  |   |
| Name of the representative from the SPMMD of CBSA /<br>Nom d'un représentant de la DAGBS de l'ASFC   | Date  |
| MONTPETIT ROXANNE ROXANNE  | Digitally signed by MONTPETIT<br>Date: 2019.11.05 08:32:46 -05'00'  |
| Signature  | Signature   |

**PART 4 - CONTRACTOR SIGNATURE / PARTIE 4 - SIGNATURE DU CONTRACTEUR**

|  |      |           |            |
|--|------|-----------|------------|
|   | V.P. | Signature | Nov. 4, 19 |
| Name and Title of individual authorized to sign on behalf of the Contractor /<br>Nom et titre Signature de la personne autorisée à signer au nom de l'entrepreneur |      |           |            |



## TASK AUTHORIZATION FORM FORMULAIRE D'AUTORISATION DE TÂCHES

**PART 1** (completed by the Technical/Project Authority) / **PARTIE 1** (complété par le Responsable technique / Chargé du projet)

|   |                             |                                      |                                       |   |
|---|-----------------------------|--------------------------------------|---------------------------------------|---|
| <b>A. General Information / Informations générales</b>  |                             |                                      |                                       |   |
| <p>Contract Number / Numéro du contrat : <b>47060-187626/001/EL</b></p> <p>Contractor Name / Nom du Contracteur : <b>S.i. Systems ULC</b></p> |                             |                                      |                                       |   |
| Task Authorization (TA) No.<br>Nº de l'autorisation de tâches (AT) :  | STOT No.<br>Nº de l'EDT :   | Financial Coding<br>Code financier : | Date of Issuance<br>Date d'émission : | Response required by<br>Réponse requise<br>d'ici le : |
| 2020000033  | Project Executives, Level 3 | 1910 700 00                          | 2020-08-10                            | 2020-08-14  |

|  |  |  |  |  |
|--|--|--|--|--|
| <b>B. For Amendments Only / Aux fins de modification seulement</b>   |  |  |  |  |
| <p>Amendment No. / Nº de la modification : <b>2</b></p> <p>Reason for the Amendment / Raison pour la modification :</p> <p><b>Exercise option to renew / add days to resource categories / amend resources on TA</b></p> |  |  |  |  |

|   |  |   |   |  |
|---|--|---|---|--|
| <b>C. TA Requirements / Exigences relatives à l'AT</b>  |  |   |   |  |
| Required Resource(s) / Ressource(s) requise(s)  |  |   |   |  |
| Category and Level<br>Catégorie et Niveau   | Estimated Level of Effort (days) / Niveau d'effort estimatif (jours) | Linguistic Profile / Profile linguistique | Required Level(s) of Security /<br>Niveau(x) de sécurité requis |  |
| Project Executive Level 3   |  | English                                   | Secret  |  |
| Project Executive Level 3   |  | English                                   | Secret  |  |
| Project Executive Level 3   |  | English                                   | Secret  |  |
| Project Executive Level 3   |  | English                                   | Secret  |  |
| Project Executive Level 3   |  | English                                   | Secret  |  |
| Statement of Work (tasks, deliverables, reports, etc.) / Énoncé des travaux (tâches, livrables, rapports, etc.) |  |   |   |  |
| <b>See attached / Voir pièce jointe</b>   |  |   |   |  |

|   |  |   |                    |  |
|---|--|---|--------------------|--|
| <b>Period of Services / Période de service:</b>   |  |   |                    |  |
| Initial Start Date / Date de début initiale :   | <b>07-Aug-2019</b>   | Initial End Date / Date de fin initiale : | <b>03-Sep-2020</b> |  |
| Extended End Date (See Reason for the Amendment) / Date de fin prolongée (voir Raison pour la modification):          |  |   |                    |  |
| <input checked="" type="checkbox"/> Option To Extend Initial End Date / Option pour prolonger la date de fin initiale |  |   |                    |  |
| Optional End Date(s) / Date(s) de fin optionnelle(s)  | Status / Statut  |   |                    |  |
| <b>03-Sep-2021</b>  | <input checked="" type="checkbox"/> In Effect / en vigueur |   |                    |  |
| <b>03-Sep-2022</b>  | <input type="radio"/> In Effect / en vigueur               |   |                    |  |
| <b>03-Sep-2023</b>  | <input type="radio"/> In Effect / en vigueur               |   |                    |  |
| Travel Requirement(s) / Exigence(s) de voyage :   | n/a  |   |                    |  |

Work Location(s) / Lieu(x) de travail :

Vanier Towers, 333 North River Road

Ontario

**PART 2** (completed by the Contractor and/or the Technical/Project Authority) / **PARTIE 2** (complété par le Contracteur et/ou le Responsable technique / Chargé du projet)**Contractor Resource(s) and Estimated Cost / Ressource(s) du Contracteur et Coût total estimatif**

Note: once approved, only the following resources may provide services under this TA. / Nota : une fois approuvée, seules les ressources suivantes peuvent fournir des services sous la présente AT

| Name / Nom<br>Category and Level / Catégorie et Niveau                            | PWGSC Security File No. / Nº du dossier de sécurité TPSGC | Linguistic Profile / Profil linguistique | Per Diem Rate / Taux journalier | Estimated Level of Effort (days) / Niveau d'effort estimatif (jours) | Total Estimated Cost / Coût total estimatif |
|---|---|--|---------------------------------|--|---|
| PE Level 3  | 95645331  | English                                  |                                 |  | \$324,650.00                                |
| PE Level 3 (Aug 7, 2019 - Nov 2019)   | 1029967   | English                                  |                                 |  | \$54,360.00                                 |
| PE Level 3  | 95553678  | English                                  |                                 |  | \$324,650.00                                |
| PE Level 3  | 1031505   | English                                  |                                 |  | \$324,650.00                                |
| PE Level 3  | 96190676  | English                                  |                                 |  | \$324,650.00                                |
| Estimated Cost / Coût estimatif   |   |  |                                 |  | <b>\$1,352,960.00</b>                       |
| Total Estimated Travel and Living Cost / Coût total estimatif de voyage et de vie |   |  |                                 |  | \$0.00                                      |
|   |   |  |                                 | HST 13%  | \$175,884.80                                |
| Total Estimated Cost / Coût total estimatif                                       |   |  |                                 |  | <b>\$1,528,844.80</b>                       |
| Check applicable Basis of Payment /<br>Cocher la Base de Paiement applicable :    | Maximum Price /<br>Prix Maximum :                         | <input checked="" type="checkbox"/>      | Firm Price /<br>Prix Ferme :    | <input type="checkbox"/>   |   |

**PART 3 - TA APPROVAL BY CANADA / PARTIE 3 - APPROBATION DE L'AT PAR LE CANADA**

By signing this TA, the Technical Authority, the representative from the SPMMD of CBSA and/or the PWGSC Contracting Authority certify(ies) that the content of this TA is in accordance with the conditions of the Contract.

The client's authorization limit is \$250,000. When the value of a TA and its amendments (excluding Applicable Taxes) is in excess of this limit, the TA must be signed by the authorized client and forwarded to the PWGSC Contracting Authority for authorization.

En apposant sa signature sur l'AT, l'autorité technique, le représentant de la DAGBS de l'ASFC et/ou l'autorité contractante de TPSGC atteste(nt) que le contenu de cette AT est conforme aux conditions du contrat.

La limite d'autorisation du client est \$250,000. Lorsque la valeur de l'AT et ses modifications (excluant les taxes applicables) dépasse cette limite, l'AT doit être signée par le client autorisé et transmise à l'autorité contractante de TPSGC pour autorisation,

Ali Sheikh

2020-18-13

| Name of Technical Authority / Nom de l'autorité technique  | Date | Name of Contracting Authority / Nom de l'autorité contractante | Date  |
|--|------|--|---|
|                 |      | Bastien,<br>Josee  | Digitally signed by: Bastien, Josee<br>DN: CN = Bastien, Josee C = CA<br>O = GC OU = PWGSC-TPSGC<br>Date: 2020.08.18 08:32:43 -04'00' |
| Signature  |      | Signature  |   |
| Name of the representative from the SPMMD of CBSA /<br>Nom d'un représentant de la DAGBS de l'ASFC | Date |  |   |

**KNOX JOSH**

Digitally signed by KNOX, JOSH  
DN: CN = KNOX, JOSH, OU=PERSONNEL, CN=KNOX  
JOSH + SERAINE MBER-03120915053449  
Reason: I am the author of this document  
Location: your signing location here  
Date: 2020-08-17 11:19:35  
Foxit PhantomPDF Version: 9.7.0

Signature

**PART 4 - CONTRACTOR SIGNATURE / PARTIE 4 - SIGNATURE DU CONTRACTEUR****Tom Riley**Name and Title of individual authorized to sign on behalf of the Contractor /  
Nom et titre Signature de la personne autorisée à signer au nom de l'entrepreneur

Digitally signed by Tom Riley  
DN: C=CA, OU=FDS, OnSi Systems, CN=Tom Riley, E=tom.riley@sisystems.com  
Reason: I am the author of this document  
Location: your signing location here  
Date: 2020-08-17 11:19:35  
Foxit PhantomPDF Version: 9.7.2

Signature

Date



**Purchasing Office - Bureau des achats:**

Informatics Professional Services - EL  
Division/Services professionnels en informatique  
- division EL  
Terrasses de la Chaudière 4th Floor  
10 Wellington Street  
Gatineau  
Québec  
K1A 0S5

|  |   |  |
|--|---|--|
| <b>Title - Sujet</b><br>ITSSC (Workstream 2)   |   |  |
| <b>Contract No. - N° du contrat</b><br>47060-187626/003/EL   | <b>Date</b><br>2018-08-29                           |  |
| <b>Client Reference No. - N° de référence du client</b><br>1000337626  |   |  |
| <b>Requisition No. - N° de la demande</b><br>47060-187626  |   |  |
| <b>File No. - N° de dossier</b><br>632el.47060-187626  | <b>CCC No./N° CCC - FMS No./N° VME</b>              |  |
| <b>Financial Code(s)</b><br><b>Code(s) financier(s)</b><br>1950-400-00   |   | <b>GST/HST</b><br><b>TPS/TVH</b><br><input type="checkbox"/> |
| <b>F.O.B. - F.A.B.</b><br>Other - Autre Specified herein - Précisé dans les présentes  |   |  |
| <b>GST/HST - TPS/TVH</b><br>See Herein - Voir ci-inclus  | <b>Duty - Droits</b><br>See Herein - Voir ci-inclus |  |
| <b>Destination - of Goods, Services, and Construction:</b><br><b>Destination - des biens, services et construction:</b>                      |   |  |
| Specified Herein<br>Précisé dans les présentes   |   |  |
| <b>Invoices - Original and two copies to be sent to:</b><br><b>Factures - Envoyer l'original et deux copies à:</b>                           |   |  |
| Specified Herein<br>Précisé dans les présentes   |   |  |
| <b>Address Enquiries to: - Adresser toutes questions à:</b><br>Lapalme, Francis  |   | <b>Buyer Id - Id de l'acheteur</b><br>632el                  |
| <b>Telephone No. - N° de téléphone</b><br>(613) 858-9912 ( ) -   |   | <b>FAX No. - N° de FAX</b><br>( ) -                          |
| <b>Total Estimated Cost - Coût total estimatif</b><br>\$1,062,732.48   |   | <b>Currency Type - Devise</b><br>CAD                         |
| <b>For the Minister - Pour le Ministre</b> <b>Lapalme, Francis</b> Digitally signed by Lapalme, Francis<br>Date: 2018.08.29 12:04:26 -04'00' |   |  |

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**CONTRACT**

**FOR**

**FOR TASK- BASED INFORMATICS PROFESSIONAL SERVICES  
(TBIPS)**

**FOR**

**VARIOUS INFORMATICS PROFESSIONAL RESOURCE CATEGORIES  
(SEE HEREIN)**

**REQUESTED BY**

**THE CANADA BORDER SERVICES AGENCY (CBSA)**

**THIS DOCUMENT CONTAINS SECURITY REQUIREMENTS.**

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**List of Annexes to the Resulting Contract:**  
Annex A - Statement of Work

Appendix A to Annex A - Tasking Assessment Procedure  
Appendix B to Annex A - Task Authorization (TA) Form  
Appendix C to Annex A - Resources Assessment Criteria and Response Table  
Appendix D to Annex A - Certifications at the TA stage

Annex B – Basis of Payment  
Annex C - Security Requirements Check List

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## 1. Requirement

- (a) Tundra Technical Solutions Inc. (the "**Contractor**") agrees to supply to the Client the services described in the Contract, including the Statement of Work, in accordance with, and at the prices set out in, the Contract. This includes providing professional services as and when requested by Canada, to one or more locations to be designated by Canada, excluding any locations in areas subject to any of the Comprehensive Land Claims Agreements.
- (b) **Client:** Under the Contract, the "**Client**" is Canada Border Services Agency (CBSA).
- (c) **Reorganization of Client:** The Contractor's obligation to perform the Work will not be affected by (and no additional fees will be payable as a result of) the renaming, reorganization, reconfiguration, or restructuring of any Client. The reorganization, reconfiguration and restructuring of the Client includes the privatization of the Client, its merger with another entity, or its dissolution, where that dissolution is followed by the creation of another entity or entities with mandates similar to the original Client. In connection with any form of reorganization, Canada may designate another department or government body as the Contracting Authority or Technical Authority, as required to reflect the new roles and responsibilities associated with the reorganization.
- (d) **Defined Terms:** Words and expressions defined in the General Conditions or Supplemental General Conditions and used in the Contract have the meanings given to them in the General Conditions or Supplemental General Conditions. Any reference to an Identified User in the Supply Arrangement is a reference to the Client. Also, any reference to a "deliverable" or "deliverables" includes all documentation outlined in this Contract. A reference to a "local office" of the Contractor means an office having at least one full time employee that is not a shared resource working at that location.

## 2. Task Authorization

- (a) **As-and-when-requested Task Authorizations:** The Work or a portion of the Work to be performed under the Contract will be on an "as-and-when-requested basis" using a Task Authorization (TA). The Work described in the TA must be in accordance with the scope of the Contract. The Contractor must not commence work until a validly issued TA has been issued by Canada and received by the Contractor. The Contractor acknowledges that any work performed before such issuance and receipt will be done at the Contractor's own risk.
- (b) **Allocation of Task Authorizations:** More than one contract has been awarded for this requirement. As a result, the Task Authorizations issued under this series of contracts will be allocated in accordance with the following:
  - (i) At the time this series of contracts was awarded, each contractor was allocated an amount of funding as specified in the Limitation of Expenditure based on the evaluation process described in the bid solicitation that resulted in the award of this series of contracts.
  - (ii) When a Task Authorization is issued, Canada will use a rotational method to allocate the draft Task Authorizations where the rotation is based on the ranking obtained by the Contractor during the Bid Solicitation.
  - (iii) Canada will send the first TA to the first ranked Contractor and the second TA to the second ranked Contractor. This rotational process will be repeated for each subsequent series of TAs issued by Canada.
  - (iv) The Contractor sent a draft TA will have the time set out further below under the sub-paragraph entitled "Contractor's Response to Draft Task Authorization" to respond to the Contracting Authority.
  - (v) If the Contractor to whom the draft TA is first sent either fails to respond on time or confirms in writing that it refuses to perform the task, the draft TA will then be forwarded to the next-ranked Contractor. In the event that Canada determines the proposed

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resource(s) does not meet the minimum experience or other requirements of the categories identified in the draft TA, Canada may, at its entire discretion request that the Contractor propose another resource and the Contractor will have the time set out in the subparagraph "Contractor's Response to Draft Task Authorization" to respond. If the Contractor fails to respond on time or Canada determines that the proposed resource(s) does not meet the minimum experience or other requirements of the categories identified in the draft TA, the draft TA will be forwarded to the next-ranked Contractor.

- (vi) If the Contractor refuses a TA or fails to submit a valid response, the dollar value of the TA may be subtracted from the dollar value of the Contractor's Contract and may be re-allocated, at the Contracting Authority's sole discretion, in whole or in part, to the other contractors in that same Workstream.
- (vii) The process of sending out a draft TA will continue until Canada either cancels the requirement for the task or it has been validly issued to one of the contractors. If none of the contractors can perform the task (in accordance with all the terms and conditions of this series of contracts), Canada may acquire the required Work by other means.
- (viii) Any of the contractors may advise the Technical Authority and the Contracting Authority in writing that it is unable to carry out additional tasks as a result of previous commitments under one or more TAs issued under this series of contracts, and no draft TA will be sent to that contractor until that contractor has given notice in writing to the Technical Authority and the Contracting Authority that it is again available to perform additional tasks.
- (ix) If it is found that the allocation process described at part (ii) above has resulted in the award of a disproportionate dollar value of work between the Contractors, the Contractors agree that Canada, in its sole discretion, may deviate from the allocation process and issue TAs in the manner required to re-establish a proportional allocation.

(c) **Assessment of Resources Proposed at TA Stage:** Processes for issuing, responding to and assessing Task Authorizations are further detailed in Appendices A, B, C and D of Annex A.

(d) **Form and Content of draft Task Authorization:**

- (i) The Technical Authority will provide the Contractor with a description of the task in a draft Task Authorization using the form specified in Annex A.
- (ii) The draft Task Authorization will contain the details of the activities to be performed, and must also contain the following information:
  - (A) the task number;
  - (B) The date by which the Contractor's response must be received (which will appear in the draft Task Authorization, but not the issued Task Authorization);
  - (C) the categories of resources and the number required;
  - (D) a description of the work for the task outlining the activities to be performed and identifying any deliverables (such as reports);
  - (E) the start and completion dates;
  - (F) milestone dates for deliverables and payments (if applicable);
  - (G) the number of person-days of effort required;
  - (H) whether the work requires on-site activities and the location;
  - (I) the language profile of the resources required;
  - (J) the level of security clearance required of resources;
  - (K) the price payable to the Contractor for performing the task, with an indication of whether it is a firm price or a maximum TA price (and, for maximum price task authorizations, the TA must indicate how the final amount payable will be

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determined; where the TA does not indicate how the final amount payable will be determined, the amount payable is the amount, up to the maximum, that the Contractor demonstrates was actually worked on the project, by submitting time sheets filled in at the time of the work by the individual resources to support the charges); and

(L) any other constraints that might affect the completion of the task.

(e) **Contractor's Response to Draft Task Authorization:** The Contractor must provide to the Technical Authority, within 5 working days of receiving the draft Task Authorization (or within any longer time period specified in the draft TA), a quotation with the proposed total price for performing the task and a breakdown of that cost, established in accordance with the Basis of Payment specified in the Contract, as well as its corresponding proposed resource(s) in accordance with Appendix A to Annex A of the Contract. The Contractor's quotation must be based on the rates set out in the Contract. The Contractor will not be paid for preparing or providing its response or for providing other information required to prepare and validly issue the TA.

(f) **Task Authorization Limit and Authorities for Validly Issuing Task Authorizations:**

To be validly issued, a TA must include the following signatures:

(i) for any TA, inclusive of revisions, with a value less than or equal to \$250,000 (excluding Applicable Taxes), the TA must be signed by:

- (A) the Technical Authority; and
- (B) a representative from the Strategic Procurement and Material Management Division (SPMMD) of CBSA.

(ii) for any TA with a value greater than this amount, a TA must be signed by:

- (A) the Technical Authority;
- (B) a representative from the Strategic Procurement and Material Management Division (SPMMD) of CBSA; and
- (C) the Contracting Authority.

Any TA that does not bear the appropriate signature(s) is not validly issued by Canada. Any work performed by the Contractor without receiving a validly issued TA is done at the Contractor's own risk. If the Contractor receives a TA that is not appropriately signed, the Contractor must notify the Contracting Authority. By providing written notice to the Contractor, the Contracting Authority may suspend the Client's ability to issue TA's at any time, or reduce the dollar value threshold described in sub-article (i) above; any suspension or reduction notice is effective upon receipt.

(g) **Periodic Usage Reports:**

(i) The Contractor must compile and maintain records on its provision of services to the federal government under Task Authorizations validly issued under the Contract. The Contractor must provide this data to Canada in accordance with the reporting requirements detailed below. If some data is not available, the reason must be indicated. If services are not provided during a given period, the Contractor must still provide a "NIL" report. The data must be submitted on a quarterly basis to the Contracting Authority. From time to time, the Contracting Authority may also require an interim report during a reporting period.

(ii) The quarterly periods are defined as follows:

- (A) 1<sup>st</sup> quarter: April 1 to June 30;
- (B) 2<sup>nd</sup> quarter: July 1 to September 30;

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- (C) 3<sup>rd</sup> quarter: October 1 to December 31; and
- (D) 4<sup>th</sup> quarter: January 1 to March 31.

The data must be submitted to the Contracting Authority no later than 15 calendar days after the end of the reporting period.

- (iii) Each report must contain the following information for each validly issued TA (as amended):
  - (A) the Task Authorization number and the Task Authorization Revision number(s), if applicable;
  - (B) a title or a brief description of each authorized task;
  - (C) the name, Resource category and level of each resource involved in performing the TA, as applicable;
  - (D) the total estimated cost specified in the validly issued TA of each task, exclusive of Applicable Taxes;
  - (E) the total amount, exclusive of Applicable Taxes, expended to date against each authorized task;
  - (F) the start and completion date for each authorized task; and
  - (G) the active status of each authorized task, as applicable (e.g., indicate whether work is in progress or if Canada has cancelled or suspended the TA, etc.).
- (iv) Each report must also contain the following cumulative information for all the validly issued TA's (as amended):
  - (A) the amount, exclusive of Applicable Taxes, specified in the Contract (as last amended, as applicable) as Canada's total liability to the Contractor for all validly issued TA's; and
  - (B) the total amount, exclusive of Applicable Taxes, expended to date against all validly issued TA's.

- (h) **Refusal of Task Authorizations or Submission of a Response which is not Valid:** The Contractor is not required to submit a response to every draft TA sent to it by Canada. However, in addition to Canada's other rights to terminate the Contract, Canada may immediately, and without further notice, terminate the Contract for default in accordance with the General Conditions if the Contractor in at least three instances has either not responded or has not submitted a valid response when sent a draft TA. For greater clarity, each draft TA, which is identifiable by its task number, will only count as one instance. A valid response is one that is submitted within the required time period and meets all requirements of the draft TA issued, including proposing the required number of resources who each meet the minimum experience and other requirements of the categories identified in the draft TA at pricing not exceeding the rates set out in Annex B.
- (i) **Consolidation of TA's for Administrative Purposes:** The Contract may be amended from time to time to reflect all validly issued Task Authorizations to date, to document the Work performed under those TA's for administrative purposes.

### **3. Minimum Work Guarantee**

- (a) In this clause,
  - (i) **"Maximum Contract Value"** means the amount specified in the **"Limitation of Expenditure"** clause set out in the Contract; and
  - (ii) **"Minimum Contract Value"** means \$20,000.00.

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- (b) Canada's obligation under the Contract is to request Work in the amount of the Minimum Contract Value or, at Canada's option, to pay the Contractor at the end of the Contract in accordance with sub-article (c), subject to sub-article (d). In consideration of such obligation, the Contractor agrees to stand in readiness throughout the Contract Period to perform the Work described in the Contract. Canada's maximum liability for work performed under the Contract must not exceed the Maximum Contract Value, unless an increase is authorized in writing by the Contracting Authority.
- (c) In the event that Canada does not request work in the amount of the Minimum Contract Value during the Contract Period, Canada must pay the Contractor the difference between the Minimum Contract Value and the total cost of the Work requested.
- (d) Canada will have no obligation to the Contractor under this article if Canada terminates the entire Contract
  - (i) for default;
  - (ii) for convenience as a result of any decision or recommendation of a tribunal or court that the contract be cancelled, re-tendered or awarded to another supplier; or
  - (iii) for convenience within ten business days of Contract award.

#### 4. Standard Clauses and Conditions

All clauses and conditions identified in the Contract by number, date and title are set out in the Standard Acquisition Clauses and Conditions Manual (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.

(a) **General Conditions:**

- (i) 2035 (2016-04-04), General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

With respect to Section 30 - Termination for Convenience, of General Conditions 2035, Subsection 04 is deleted and replaced with the following Subsections 04, 05 and 06:

4. The total of the amounts, to which the Contractor is entitled to be paid under this section, together with any amounts paid, due or becoming due to the Contractor must not exceed the Contract Price.
5. Where the Contracting Authority terminates the entire Contract and the Articles of Agreement include a Minimum Work Guarantee, the total amount to be paid to the Contractor under the Contract will not exceed the greater of:
  - (a) the total amount the Contractor may be paid under this section, together with any amounts paid, becoming due other than payable under the Minimum Work Guarantee, or due to the Contractor as of the date of termination, or
  - (b) the amount payable under the Minimum Work Guarantee, less any amounts paid, due or otherwise becoming due to the Contractor as of the date of termination.
6. The Contractor will have no claim for damages, compensation, loss of profit, allowance arising out of any termination notice given by Canada under this section except to the extent that this section expressly provides. The Contractor agrees to repay immediately to Canada the portion of any advance payment that is unliquidated at the date of the termination.

(b) **Supplemental General Conditions:**

The following Supplemental General Conditions:

- (i) 4002 (2010-08-16), Supplemental General Conditions - Software Development or Modification Services;
- (ii) 4007 (2010-08-16), Supplemental General Conditions - Canada to Own Intellectual Property Rights in Foreground Information;

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apply to and form part of the Contract.

## 5. Security Requirement

The following security requirements (Common PS SRCL#19 and related clauses provided by the Contract Security Program) as set out under Annex "B" to the Supply Arrangement, applies to and forms part of the Contract.

- (a) The Contractor must, at all times during the performance of the Contract, hold a valid Facility Security Clearance at the level of SECRET, issued by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC).
- (b) The Contractor personnel requiring access to PROTECTED/CLASSIFIED information, assets or sensitive work site(s) must EACH hold a valid personnel security screening at the level of SECRET, granted or approved by CISD/PWGSC.
- (c) The Contractor MUST NOT remove any PROTECTED/CLASSIFIED information from the identified work site(s), and the Contractor must ensure that its personnel are made aware of and comply with this restriction.
- (d) Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of CISD/PWGSC.
- (e) The Contractor must comply with the provisions of the:
  - (i) Security Requirements Check List and security guide (if applicable), attached at Annex C;
  - (ii) Industrial Security Manual (Latest Edition).
- (f) Additional Security Requirement
  - (i) The CBSA, will conduct its own personnel Reliability Status assessment of the Contractor (specifically the Contractor personnel), which is allowed under the Treasury Board Secretariat of Canada's (TBS) "Security and Contracting Management Standard" and the Policy on Government Security – Personnel Security Standard. Reliability Status assessment conducted by the CBSA will include a credit check.
  - (ii) If the Contractor (specifically the Contractor personnel), has already been screened under the TBS Policy on Government Security - Personnel Security Standard, the Contractor (specifically the Contractor personnel), will still undergo a security screening process to be conducted by the CBSA.
  - (iii) The credit check and fingerprinting\*, if required, will be performed by an authorized security official with the CBSA's "Personnel Security Screening Section" (PSSS), which is independent of the Public Works and Government Services Canada's (PWGSC), "Canadian and International Industrial Security Directorate" (CIISD).
  - (iv) Until the credit check, fingerprinting\* (if required) and all other security screening processes required have been completed and the Contractor (specifically the Contractor personnel) is deemed suitable by the CBSA, the Contractor (specifically the Contractor personnel) will not be permitted access to Protected / Classified information or assets, and further, will not be permitted to enter sites where such information or assets are kept.

\*Fees are applicable. Fingerprinting, if required, will be at the Bidder's cost.

## 6. Contract Period

- (a) **Contract Period:** The "Contract Period" is the entire period of time during which the Contractor is obliged to perform the Work, which includes:
  - (i) The "Initial Contract Period", which begins on September 4, 2018 and ends two years later; and

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(ii) The period during which the Contract is extended, if Canada chooses to exercise any options set out in the Contract.

(b) **Option to Extend the Contract:**

(i) The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to three additional one-year periods under the same terms and conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions set out in the Basis of Payment.

(ii) Canada may exercise this option at any time by sending a written notice to the Contractor before the expiry date of the Contract. The option may only be exercised by the Contracting Authority, and will be evidenced, for administrative purposes only, through a contract amendment.

## 7. Authorities

### (a) Contracting Authority

The Contracting Authority for the Contract is:

Name: Francis Lapalme  
Title: A/Supply Team Leader  
Organization: Public Works and Government Services Canada  
Acquisitions Branch  
Directorate: Informatics and Telecommunications Systems Procurement Directorate  
Address: 10 Wellington St., Gatineau, Québec  
Telephone: 613-858-9912  
E-mail address: [francis.lapalme@tpsgc-pwgsc.gc.ca](mailto:francis.lapalme@tpsgc-pwgsc.gc.ca)

The Contracting Authority is responsible for the management of the Contract and any changes to the Contract must be authorized in writing by the Contracting Authority. The Contractor must not perform work in excess of or outside the scope of the Contract based on verbal or written requests or instructions from anybody other than the Contracting Authority.

### (b) Technical Authority

The Technical Authority for the Contract is:

Name: Louis Albert  
Title: A/Director, Open Government and Data Analytics Division  
Organization: Canada Border Services Agency  
Address: 333 North River Rd, Ottawa, ON K1A 0L8  
Telephone: 343-291-6207  
Facsimile: 343-291-7381  
E-mail address: [louis.albert@cbsa-asfc.gc.ca](mailto:louis.albert@cbsa-asfc.gc.ca)

In his absence, the Technical Authority for the Contract is:

Name: Ali Sheikh  
Title: A/Manager, Business Analytics Competency Centre  
Organization: Canada Border Services Agency  
Address: 333 North River Rd, Ottawa, ON K1A 0L8  
Telephone: 343-291-5590  
Facsimile: 343-291-7381  
E-mail address: [ali.sheikh@cbsa-asfc.gc.ca](mailto:ali.sheikh@cbsa-asfc.gc.ca)

The Technical Authority is the representative of the department or agency for whom the Work is being carried out under the Contract and is responsible for all matters concerning the technical content of the Work under the Contract. Technical matters may be discussed with the Technical Authority; however, the Technical Authority has no authority to authorize changes to the scope of

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the Work. Changes to the scope of the Work can only be made through a contract amendment issued by the Contracting Authority.

(c) **Contractor's Representative**

Name: Jeremy Mack  
Title: Director of Sales - Ontario  
Organization: Tundra Technical Solutions Inc.  
Address: 251 Laurier Ave West, Suite #1050, Ottawa, ON K1P 5J6  
Telephone: 1-866-988-6372  
Facsimile: 1-866-664-2417  
E-mail address:

**8. Proactive Disclosure of Contracts with Former Public Servants**

By providing information on its status, with respect to being a former public servant in receipt of a Public Service Superannuation Act (PSSA) pension, the Contractor has agreed that this information will be reported on departmental web sites as part of the published proactive disclosure reports, in accordance with Contracting Policy Notice: 2012-2 of the Treasury Board Secretariat of Canada.

**9. Payment**

(a) **Basis of Payment**

- (i) **Professional Services provided under a Task Authorization with a Maximum Price:** For professional services requested by Canada, in accordance with a validly issued Task Authorization, Canada will pay the Contractor, in arrears, up to the Maximum Price for the TA, for actual time worked and any resulting deliverables in accordance with the firm all-inclusive per diem rates set out in Annex B, Basis of Payment, Applicable Taxes extra. Partial days will be prorated based on actual hours worked based on a 7.5-hour workday.
- (ii) **Professional Services provided under a Task Authorization with a Firm Price:** For professional services requested by Canada, in accordance with a validly issued Task Authorization, Canada will pay the Contractor the firm price set out in the Task Authorization (based on the firm, all-inclusive per diem rates set out in Annex B), Applicable Taxes extra.
- (iii) **Travel and Living Expenses – National Joint Council Travel Directive:** The Contractor will be reimbursed its authorized travel and living expenses reasonably and properly incurred in the performance of the Work, at cost, without any allowance for profit and/or administrative overhead, in accordance with the meal and private vehicle expenses provided in Appendices B, C and D of the National Joint Council Travel Directive and with the other provisions of the directive referring to "travellers", rather than those referring to "employees". All travel must have the prior authorization of the Technical Authority. Travel requests will only be considered for a work location which is located more than 100 kilometers from the National Capital Region. The Contractor will be paid for actual time spent travelling at half the hourly rate. The hourly rate will be determined by dividing the firm per diem rate set out in Annex B by 7.5 hours. All payments are subject to government audit.
- (iv) **Competitive Award:** The Contractor acknowledges that the Contract has been awarded as a result of a competitive process. No additional charges will be allowed to compensate for errors, oversights, misconceptions or underestimates made by the Contractor when bidding for the Contract.
- (v) **Contractor's Firm Per Diem Rates:** The Contractor agrees that the rates set out in Annex B remain firm throughout the Contract Period, except as may be provided for in the express terms of the contract. In reference to Article 18(1) of SACC General Conditions 2035, the Contractor acknowledges that its obligation to provide services in

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accordance with the firm rates set out in Annex B is unaffected by the application of any existing law or any new law which may come into effect during the Contract Period.

(vi) **Professional Services Rates:** In Canada's experience, bidders from time to time propose rates at the time of bidding for one or more Resource Categories that they later refuse to honour, on the basis that these rates do not allow them to recover their own costs and/or make a profit. This denies Canada of the benefit of the awarded contract. If the Contractor does not respond or refuses to provide an individual with the qualifications described in the Contract within the time described in the Contract (or proposes instead to provide someone from an alternate category at a different rate), whether or not Canada terminates the Contract as a whole or in part or chooses to exercise any of the rights provided to it under the general conditions, Canada may impose sanctions or take other measures in accordance with the PWGSC Vendor Performance Corrective Measure Policy (or equivalent) then in effect, which measures may include an assessment that results in conditions applied against the Contractor to be fulfilled before doing further business with Canada, or full debarment of the Contractor from bidding on future requirements.

(b) **Limitation of Expenditure – Cumulative Total of all Task Authorizations**

(i) Canada's total liability to the Contractor under the Contract for all validly issued Task Authorizations (TAs), inclusive of any revisions, must not exceed the amount set out on page 1 of the Contract, less any Applicable taxes. With respect to the amount set out on page 1 of the Contract, Customs duties are excluded and Applicable Taxes are included

(ii) No increase in the total liability of Canada will be authorized or paid to the Contractor unless an increase has been approved, in writing, by the Contracting Authority.

(iii) The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:

(A) when it is 75 percent committed, or

(B) 4 months before the contract expiry date, or

(C) As soon as the Contractor considers that the sum is inadequate for the completion of the Work required in all authorized TAs, inclusive of any revisions, whichever comes first.

(i) If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority a written estimate for the additional funds required. Providing this information does not increase Canada's liability.

(c) **Method of Payment for Task Authorizations with a Maximum Price:** For each Task Authorization validly issued under the Contract that contains a maximum price:

(i) Canada will pay the Contractor no more frequently than once a month in accordance with the Basis of Payment. The Contractor must submit time sheets for each resource showing the days and hours worked to support the charges claimed in the invoice.

(ii) Once Canada has paid the maximum TA price, Canada will not be required to make any further payment, but the Contractor must complete all the work described in the TA, all of which is required to be performed for the maximum TA price. If the work described in the TA is completed in less time than anticipated, and the actual time worked (as supported by the time sheets) at the rates set out in the Contract is less than the maximum TA price, Canada is only required to pay for the time spent performing the work related to that TA.

(d) **Method of Payment for Task Authorizations with a Firm Price - Lump Sum Payment on Completion:** Canada will pay the Contractor upon completion and delivery of all the Work associated with the validly issued Task Authorization in accordance with the payment provisions of the Contract if:

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- (i) an accurate and complete invoice and any other documents required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- (ii) all such documents have been verified by Canada; and
- (iii) the Work delivered has been accepted by Canada.

(e) **Electronic Payment of Invoices – Contract**

The Contractor accepts to be paid using any of the following Electronic Payment Instrument(s):

- (i) Direct Deposit (Domestic and International);

(f) **Time Verification**

Time charged and the accuracy of the Contractor's time recording system are subject to verification by Canada, before or after payment is made to the Contractor. If verification is done after payment, the Contractor must repay any overpayment, at Canada's request.

(g) **No Responsibility to Pay for Work not performed due to Closure of Government Offices**

- (i) Where the Contractor, its employees, subcontractors, or agents are providing services on government premises under the Contract and those premises are inaccessible because of the evacuation or closure of government offices, and as a result no work is performed, Canada is not responsible for paying the Contractor for work that otherwise would have been performed if there had been no evacuation or closure.
- (ii) If, as a result of any strike or lock-out, the Contractor or its employees, subcontractors or agents cannot obtain access to government premises and, as a result, no work is performed, Canada is not responsible for paying the Contractor for work that otherwise would have been performed if the Contractor had been able to gain access to the premises

## **10. Invoicing Instructions**

- (a) The Contractor must submit invoices in accordance with the information required in the General Conditions.
- (b) The Contractor's invoice must include a separate line item for each subparagraph in the Basis of Payment provision, and must show all applicable Task Authorization numbers.
- (c) By submitting invoices, the Contractor is certifying that the goods and services have been delivered and that all charges are in accordance with the Basis of Payment provision of the Contract, including any charges for work performed by subcontractors.
- (d) The Contractor must provide the original of each invoice to the Technical Authority, and a copy to the Contracting Authority.

## **11. Certifications and Additional Information**

Unless specified otherwise, the continuous compliance with the certifications provided by the Contractor in its bid or precedent to contract award, any TA quotation and the ongoing cooperation in providing additional information are conditions of the Contract and failure to comply will constitute the Contractor in default. Certifications are subject to verification by Canada during the entire Contract Period.

## **12. Federal Contractors Program for Employment Equity - Default by Contractor**

The Contractor understands and agrees that, when an Agreement to Implement Employment Equity (AIEE) exists between the Contractor and Employment and Social Development Canada (ESDC)-Labour, the AIEE must remain valid during the entire period of the Contract. If the AIEE becomes invalid, the name of the Contractor will be added to the "FCP Limited Eligibility to Bid" list. The imposition of such a sanction by ESDC will constitute the Contractor in default as per the terms of the Contract.

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### **13. Applicable Laws**

The Contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario.

### **14. Priority of Documents**

If there is a discrepancy between the wording of any documents that appear on the following list, the wording of the document that first appears on the list has priority over the wording of any document that appears later on the list:

- (a) these Articles of Agreement, including any individual SACC clauses incorporated by reference in these Articles of Agreement;
- (b) Supplemental General Conditions, in the following order:
  - (i) 4002 (2010-08-16), Supplemental General Conditions - Software Development or Modification Services;
  - (ii) 4007 (2010-08-16), Supplemental General Conditions - Canada to Own Intellectual Property Rights in Foreground Information;
- (c) General Conditions 2035 (2016-04-04), Higher Complexity - Services;
- (d) Annex A, Statement of Work – Annex A including its Appendices as follows:
  - (i) Appendix A to Annex A - Tasking Assessment Procedure;
  - (ii) Appendix B to Annex A - Task Authorization (TA) Form;
  - (iii) Appendix C to Annex A - Resource Assessment Criteria and Response Table;
  - (iv) Appendix D to Annex A - Certifications at the TA stage;
- (e) Annex B, Basis of Payment;
- (f) Annex C, Security Requirements Check List;
- (g) the validly issued Task Authorizations and any required certifications (including all of their annexes, if any); and
- (h) the Contractor's bid dated June 19, 2018.

### **15. Foreign Nationals (Canadian Contractor)**

- (a) SACC Manual clause A2000C (2006-06-16) Foreign Nationals (Canadian Contractor)

### **16. Insurance Requirements**

#### **(a) Compliance with Insurance Requirements**

- (i) The Contractor must comply with the insurance requirements specified in this Article. The Contractor must maintain the required insurance coverage for the duration of the Contract. Compliance with the insurance requirements does not release the Contractor from or reduce its liability under the Contract.
- (ii) The Contractor is responsible for deciding if additional insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any additional insurance coverage is at the Contractor's expense, and for its own benefit and protection.
- (iii) The Contractor should forward to the Contracting Authority within ten (10) days after the date of award of the Contract a Certificate of Insurance evidencing the insurance coverage. Coverage must be placed with an Insurer licensed to carry out business in Canada and the Certificate of Insurance must confirm that the insurance policy complying with the requirements is in force. If the Certificate of Insurance has not been completed

and submitted as requested, the Contracting Authority will so inform the Contractor and provide the Contractor with a time frame within which to meet the requirement. Failure to comply with the request of the Contracting Authority and meet the requirement within the time period will constitute a default under the General Conditions. The Contractor must, if requested by the Contracting Authority, forward to Canada a certified true copy of all applicable insurance policies.

(b) **Commercial General Liability Insurance**

- (i) The Contractor must obtain Commercial General Liability Insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature, but for not less than \$2,000,000 per accident or occurrence and in the annual aggregate.
- (ii) The Commercial General Liability policy must include the following:
  - (A) Additional Insured: Canada is added as an additional insured, but only with respect to liability arising out of the Contractor's performance of the Contract. The interest of Canada should read as follows: Canada, as represented by Public Works and Government Services Canada.
  - (B) Bodily Injury and Property Damage to third parties arising out of the operations of the Contractor.
  - (C) Products and Completed Operations: Coverage for bodily injury or property damage arising out of goods or products manufactured, sold, handled, or distributed by the Contractor and/or arising out of operations that have been completed by the Contractor.
  - (D) Personal Injury: While not limited to, the coverage must include Violation of Privacy, Libel and Slander, False Arrest, Detention or Imprisonment and Defamation of Character.
  - (E) Cross Liability/Separation of Insureds: Without increasing the limit of liability, the policy must protect all insured parties to the full extent of coverage provided. Further, the policy must apply to each Insured in the same manner and to the same extent as if a separate policy had been issued to each.
  - (F) Blanket Contractual Liability: The policy must, on a blanket basis or by specific reference to the Contract, extend to assumed liabilities with respect to contractual provisions.
  - (G) Employees and, if applicable, Volunteers must be included as Additional Insured.
  - (H) Employers' Liability (or confirmation that all employees are covered by Worker's compensation (WSIB) or similar program)
  - (I) Broad Form Property Damage including Completed Operations: Expands the Property Damage coverage to include certain losses that would otherwise be excluded by the standard care, custody or control exclusion found in a standard policy.
  - (J) Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of policy cancellation.
  - (K) If the policy is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.
  - (L) Owners' or Contractors' Protective Liability: Covers the damages that the Contractor becomes legally obligated to pay arising out of the operations of a subcontractor.

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(M) Advertising Injury: While not limited to, the endorsement must include coverage for piracy or misappropriation of ideas, or infringement of copyright, trademark, title or slogan.

(c) **Errors and Omissions Liability Insurance**

- (i) The Contractor must obtain Errors and Omissions Liability (a.k.a. Professional Liability) insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature but for not less than \$1,000,000 per loss and in the annual aggregate, inclusive of defence costs.
- (ii) If the Professional Liability insurance is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.
- (iii) The following endorsement must be included:  
Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of cancellation.

**17. Limitation of Liability - Information Management/Information Technology**

(a) This section applies despite any other provision of the Contract and replaces the section of the general conditions entitled "Liability". Any reference in this section to damages caused by the Contractor also includes damages caused by its employees, as well as its subcontractors, agents, and representatives, and any of their employees. This section applies regardless of whether the claim is based in contract, tort, or another cause of action. The Contractor is not liable to Canada with respect to the performance of or failure to perform the Contract, except as described in this section and in any section of the Contract pre-establishing any liquidated damages. The Contractor is only liable for indirect, special or consequential damages to the extent described in this Article, even if it has been made aware of the potential for those damages.

(b) **First Party Liability:**

- (i) The Contractor is fully liable for all damages to Canada, including indirect, special or consequential damages, caused by the Contractor's performance or failure to perform the Contract that relate to:
  - (A) any infringement of intellectual property rights to the extent the Contractor breaches the section of the General Conditions entitled "Intellectual Property Infringement and Royalties";
  - (B) physical injury, including death.
- (ii) The Contractor is liable for all direct damages caused by the Contractor's performance or failure to perform the Contract affecting real or tangible personal property owned, possessed, or occupied by Canada.
- (iii) Each of the Parties is liable for all direct damages resulting from its breach of confidentiality under the Contract. Each of the Parties is also liable for all indirect, special or consequential damages in respect of its unauthorized disclosure of the other Party's trade secrets (or trade secrets of a third party provided by one Party to another under the Contract) relating to information technology.
- (iv) The Contractor is liable for all direct damages relating to any encumbrance or claim relating to any portion of the Work for which Canada has made any payment. This does not apply to encumbrances or claims relating to intellectual property rights, which are addressed under (i)(A) above.
- (v) The Contractor is also liable for any other direct damages to Canada caused by the Contractor's performance or failure to perform the Contract that relate to:

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(A) any breach of the warranty obligations under the Contract, up to the total amount paid by Canada (including any applicable taxes) for the goods and services affected by the breach of warranty; and

(B) Any other direct damages, including all identifiable direct costs to Canada associated with re-procuring the Work from another party if the Contract is terminated either in whole or in part for default, up to an aggregate maximum for this subparagraph (B) of the greater of .75 times the total estimated cost (meaning the dollar amount shown on the first page of the Contract in the cell titled "Total Estimated Cost" or shown on each call-up, purchase order or other document used to order goods or services under this instrument), or \$1,000,000.00.

In any case, the total liability of the Contractor under subparagraph (v) will not exceed the total estimated cost (as defined above) for the Contract or \$1,000,000.00, whichever is more.

(vi) If Canada's records or data are harmed as a result of the Contractor's negligence or willful act, the Contractor's only liability is, at the Contractor's own expense, to restore Canada's records and data using the most recent back-up kept by Canada. Canada is responsible for maintaining an adequate back-up of its records and data.

(c) **Third Party Claims:**

(i) Regardless of whether a third party makes its claim against Canada or the Contractor, each Party agrees that it is liable for any damages that it causes to any third party in connection with the Contract as set out in a settlement agreement or as finally determined by a court of competent jurisdiction, where the court determines that the Parties are jointly and severally liable or that one Party is solely and directly liable to the third party. The amount of the liability will be the amount set out in the settlement agreement or determined by the court to have been the Party's portion of the damages to the third party. No settlement agreement is binding on a Party unless its authorized representative has approved the agreement in writing.

(ii) If Canada is required, as a result of joint and several liability or joint and solidarily liable, to pay a third party in respect of damages caused by the Contractor, the Contractor must reimburse Canada by the amount finally determined by a court of competent jurisdiction to be the Contractor's portion of the damages to the third party. However, despite Sub-article (i), with respect to special, indirect, and consequential damages of third parties covered by this Section, the Contractor is only liable for reimbursing Canada for the Contractor's portion of those damages that Canada is required by a court to pay to a third party as a result of joint and several liability that relate to the infringement of a third party's intellectual property rights; physical injury of a third party, including death; damages affecting a third party's real or tangible personal property; liens or encumbrances on any portion of the Work; or breach of confidentiality.

(iii) The Parties are only liable to one another for damages to third parties to the extent described in this Sub-article (c).

**18. Professional Services - General**

(a) The Contractor must provide professional services on request as specified in this Contract. All resources provided by the Contractor must meet the qualifications described in the Contract (including those relating to previous experience, professional designation, education, language proficiency and security clearance) and must be competent to provide the required services by any delivery dates described in the Contract.

(b) If the Contractor fails to deliver any deliverable (excluding delivery of a specific individual) or complete any task described in the Contract on time, in addition to any other rights or remedies available to Canada under the Contract or the law, Canada may notify the Contractor of the

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deficiency, in which case the Contractor must submit a written plan to the Technical Authority within ten working days detailing the actions that the Contractor will undertake to remedy the deficiency. The Contractor must prepare and implement the plan at its own expense.

(c) In General Conditions 2035, the Article titled "Replacement of Specific Individuals" is deleted and the following applies instead:

**Replacement of Specific Individuals**

(i) If the Contractor is unable to provide the services of any specific individual identified in the Contract to perform the services, the Contractor must within five working days of having this knowledge, the individual's departure or failure to commence Work (or, if Canada has requested the replacement, within ten working days of Canada's notice of the requirement for a replacement) provide to the Contracting Authority:

- (A) the name, qualifications and experience of a proposed replacement immediately available for Work; and
- (B) security information on the proposed replacement as specified by Canada, if applicable.

The replacement must have qualifications and experience that meet or exceed those obtained for the original resource.

(ii) Subject to an Excusable Delay, where Canada becomes aware that a specific individual identified under the Contract to provide services has not been provided or is not performing, the Contracting Authority may elect to:

- (A) exercise Canada's rights or remedies under the Contract or at law, including terminating the Contract in whole or in part for default under the Article titled "Default of the Contractor", or
- (B) assess the information provided under (c) (i) above or, if it has not yet been provided, require the Contractor to propose a replacement to be rated by the Technical Authority. The replacement must have qualifications and experience that are similar or exceed those obtained for the original resource and be acceptable to Canada. Upon assessment of the replacement, Canada may accept the replacement, exercise the rights in (ii) (A) above, or require another replacement in accordance with this sub-article (c).

Where an Excusable Delay applies, Canada may require (c) (ii) (B) above instead of terminating under the "Excusable Delay" Article. An Excusable Delay does not include resource unavailability due to allocation of the resource to another Contract or project (including those for the Crown) being performed by the Contractor or any of its affiliates.

(iii) The Contractor must not, in any event, allow performance of the Work by unauthorized replacement persons. The Contracting Authority may order that an original or replacement resource stop performing the Work. In such a case, the Contractor must immediately comply with the order. The fact that the Contracting Authority does not order a resource to stop performing the Work does not relieve the Contractor from its responsibility to meet the requirements of the Contract.

(iv) The obligations in this article apply despite any changes that Canada may have made to the Client's operating environment.

**19. Safeguarding Electronic Media**

(a) Before using them on Canada's equipment or sending them to Canada, the Contractor must use a regularly updated product to scan electronically all electronic media used to perform the Work for computer viruses and other coding intended to cause malfunctions. The Contractor must notify Canada if any electronic media used for the Work are found to contain computer viruses or other coding intended to cause malfunctions.

|   |                   |                    |
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(b) If magnetically recorded information or documentation is damaged or lost while in the Contractor's care or at any time before it is delivered to Canada in accordance with the Contract, including accidental erasure, the Contractor must immediately replace it at its own expense.

## **20. Representations and Warranties**

The Contractor made statements regarding its own and its proposed resources' experience and expertise in its bid that resulted in the award of the Contract and the issuance of TA's. The Contractor represents and warrants that all those statements are true and acknowledges that Canada relied on those statements in awarding the Contract and adding work to it through TA's. The Contractor also represents and warrants that it has, and all its resources and subcontractors that perform the Work have, and at all times during the Contract Period they will have and maintain, the skills, qualifications, expertise and experience necessary to perform and manage the Work in accordance with the Contract, and that the Contractor (and any resources or subcontractors it uses) has previously performed similar services for other customers.

## **21. Access to Canada's Property and Facilities**

Canada's property, facilities, equipment, documentation, and personnel are not automatically available to the Contractor. If the Contractor would like access to any of these, it is responsible for making a request to the Technical Authority. Unless expressly stated in the Contract, Canada has no obligation to provide any of these to the Contractor. If Canada chooses, in its discretion, to make its property, facilities, equipment, documentation or personnel available to the Contractor to perform the Work, Canada may require an adjustment to the Basis of Payment and additional security requirements may apply.

## **22. Government Property**

Canada agrees to supply the Contractor with the items listed at Article 5. Client Support of Annex A – Statement of Work. The section of the General Conditions entitled "Government Property" also applies to the use of the Government Property by the Contractor.

## **23. Transition Services**

The Contractor agrees to execute the transition tasks identified within the Task Authorizations (if applicable) and it will make all reasonable efforts to assist Canada in the transition from the incumbent to the Contractor and from the Contractor to a new contract with another supplier.

## **24. Identification Protocol Responsibilities**

The Contractor will be responsible for ensuring that each of its agents, representatives or subcontractors (hereinafter referred to as Contractor Representatives) complies with the following self-identification requirements:

- (a) Contractor Representatives who attend a Government of Canada meeting (whether internal or external to Canada's offices) must identify themselves as Contractor Representatives prior to the commencement of the meeting, to ensure that each meeting participant is aware of the fact that the individual is not an employee of the Government of Canada;
- (b) During the performance of any Work at a Government of Canada site, each Contractor Representative must be clearly identified at all times as being a Contractor Representative; and
- (c) If a Contractor Representative requires the use of the Government of Canada's e-mail system in the performance of the Work, then the individual must clearly identify him or herself as an agent or subcontractor of the Contractor in all electronic mail in the signature block as well as under "Properties." This identification protocol must also be used in all other correspondence, communication, and documentation.
- (d) If Canada determines that the Contractor is in breach of any obligation stated in this Article, upon written notice from Canada the Contractor must submit a written action plan describing corrective measures it will implement to eliminate the recurrence of the problem. The Contractor will have

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five working days to deliver the action plan to the Client and the Contracting Authority, and twenty working days to rectify the underlying problem.

(e) In addition to any other rights it has under the Contract, Canada may terminate the Contract for default if the corrective measures required of the Contractor described above are not met.

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**ANNEX A**

**STATEMENT OF WORK**

**(SEE ATTACHED DOCUMENT)**

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## **APPENDIX A TO ANNEX A**

### **TASKING ASSESSMENT PROCEDURE**

1. Where a requirement for a specific task is identified, a draft Task Authorization Form (TA Form) as attached at Appendix B to Annex A will be provided to the Contractor in accordance with the allocation methodology stated in the Contract Article titled "Allocation of Task Authorizations". Once a draft TA Form is received, the Contractor must submit to the Technical Authority a quotation of rates to supply the requested Resource Categories based on the information identified in the TA Form. The quotation must be signed and submitted to Canada within the time for response identified in the TA Form. The Contractor will be given a minimum of 48 hours turnaround time to submit a quotation.
2. With each quotation the Contractor must propose the required number of resources and for each proposed resource the Contractor must supply a résumé, the requested security clearance information and must complete the Response Tables at Appendix C of Annex A applicable to the Resource Categories identified in the draft TA. The same individual must not be proposed for more than one Resource Category. The résumés must demonstrate that each proposed individual meets the qualification requirements described (including any educational requirements, work experience requirements, and professional designation or membership requirements). With respect to the proposed resources:
  - (i) Proposed resources may be employees of the Contractor or employees of a subcontractor, or these individuals may be independent contractors to whom the Contractor would subcontract a portion of the Work. (Refer to Appendix D to Annex A, Certifications).
  - (ii) For educational requirements for a particular degree, designation or certificate, Canada will only consider educational programmes that were successfully completed by the resource before the date the draft TA was first issued to the Contractor.
  - (iii) For requirements relating to professional designation or membership, the resource must have the required designation or membership by the time of draft TA issuance and must continue, where applicable, to be a member in good standing of the profession or membership throughout the assessment period and Contract Period. Where the designation or membership must be demonstrated through a certification, diploma or degree, such document must be current, valid and issued by the entity specified in this Contract or if the entity is not specified, the issuer must have been an accredited or otherwise recognized body, institution or entity at the time the document was issued.
  - (iv) For work experience, Canada will not consider experience gained as part of an educational programme, except for experience gained through a formal co-operative programme at a post-secondary institution.
  - (v) For any requirements that specify a particular time period (e.g., 2 years) of work experience, Canada will disregard any information about experience if the résumé does not include the relevant dates (month and year) for the experience claimed (i.e., the start date and end date). Canada will evaluate only the duration that the resource actually worked on a project or projects (from his or her start date to end date), instead of the overall start and end date of a project or a combination of projects in which a resource has participated.
  - (vi) A résumé must not simply indicate the title of the individual's position, but must demonstrate that the resource has the required work experience by explaining the responsibilities and work performed by the individual while in that position. Only listing experience without providing any supporting data to describe responsibilities, duties and relevance to the requirement, or reusing the same wording as the TA Form, will not be considered "demonstrated" for the purposes of the assessment. The Contractor should provide complete details as to where, when, month and year, and how, through which

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activities/responsibilities, the stated qualifications / experience were obtained. In situations in which a proposed resource worked at the same time on more than one project, the duration of any overlapping time period will be counted only once toward any requirements that relate to the individual's length of experience.

3. The qualifications and experience of the proposed resources will be assessed against the requirements set out in Appendix C to Annex A to determine each proposed resource's compliance with the mandatory and rated criteria. Canada may request proof of successful completion of formal training, as well as reference information. Canada may conduct reference checks to verify the accuracy of the information provided. If reference checks are done, they will be conducted in writing by e-mail (unless the contact at the reference is only available by telephone). Canada will not assess any points or consider a mandatory criterion met unless the response is received within 5 working days. On the third working day after sending out the e-mails, if Canada has not received a response, Canada will notify the Contractor by e-mail, to allow the Contractor to contact its reference directly to ensure that it responds to Canada within 5 working days. Wherever information provided by a reference differs from the information supplied by the Contractor, the information supplied by the reference will be the information assessed. Points will not be allocated or a mandatory criteria considered as met if the reference customer is not a customer of the Contractor itself (for example, the customer cannot be the customer of an affiliate of the Contractor). Nor will points be allocated or a mandatory criteria considered as met if the customer is itself an affiliate or other entity that does not deal at arm's length with the Contractor. Crown references will be accepted.
4. During the assessment of the resources proposed, should the references for two or more resources required under that TA either be unavailable or fail to substantiate the required qualifications of the proposed resources to perform the required services, the Contracting Authority may find the quotation to be non-responsive.
5. Only quotations that meet all of the mandatory criteria will be considered for assessment of the point rated criteria. Each resource proposed must attain the required minimum score for the point rated criteria for the applicable Resource Category. If the minimum score for any proposed resource is less than what is required, the Contractor's quotation will be found to be non-responsive.
6. Once the quotation has been accepted by the Technical Authority, the TA Form will be signed by Canada and provided to the Contractor for signature. The TA Form must be appropriately signed by Canada prior to commencement of any work. The Contractor must not commence work until a validly issued TA Form (the Task Authorization) has been received, and any work performed in its absence is done at the Contractor's own risk.

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**APPENDIX B TO ANNEX A**  
**TASK AUTHORIZATION FORM**

**(SEE DOCUMENT ATTACHED)**

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**APPENDIX C TO ANNEX A**  
**RESOURCES ASSESSMENT CRITERIA AND RESPONSE TABLE**

**(SEE DOCUMENT ATTACHED)**

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## **APPENDIX D TO ANNEX A**

### **CERTIFICATIONS AT THE TA STAGE**

The following Certifications are to be used, as applicable. If they apply, they must be signed and attached to the Contractor's quotation when it is submitted to Canada.

#### **1. CERTIFICATION OF EDUCATION AND EXPERIENCE**

The Contractor certifies that all the information provided in the résumés and supporting material proposed for completing the subject work, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Contractor to be true and accurate. Furthermore, the Contractor warrants that every individual proposed by the Contractor for the requirement is capable of performing the Work described in the Task Authorization.

---

Print name of authorized individual & sign above

---

Date

#### **2. CERTIFICATION OF AVAILABILITY OF PERSONNEL**

The Contractor certifies that, should it be authorized to provide services under this Task Authorization, the persons proposed in the quotation will be available to commence performance of the work within a reasonable time from the date of issuance of the valid Task Authorization, or within the time specified in the TA Form, and will remain available to perform the work in relation to the fulfillment of the requirement.

---

Print name of authorized individual & sign above

---

Date

#### **3. CERTIFICATION OF STATUS OF PERSONNEL**

If the Contractor has proposed any individual who is not an employee of the Contractor, the Contractor certifies that it has permission from that individual to propose his/her services in relation to the Work to be performed under this TA and to submit his/her résumé to Canada. At any time during the Contract Period the Contractor must, upon request from the Contracting Authority, provide the written confirmation, signed by the individual, of the permission that was given to the Contractor of his/her availability. Failure to comply with the request may result in a default under the Contract in accordance with the General Conditions.

---

Print name of authorized individual & sign above

---

Date

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#### 4. CERTIFICATION OF LANGUAGE - English

The Contractor certifies that the proposed resource(s) in response to this draft Task Authorization is/are fluent in English. The individual(s) proposed must be able to communicate orally and in writing in English without any assistance and with minimal errors.

---

Print name of authorized individual & sign above

---

Date

#### 5. NON-DISCLOSURE AGREEMENT

I, \_\_\_\_\_ (name of proposed resource), recognize that in the course of my work as an employee or subcontractor of \_\_\_\_\_ (name of contractor), I may be given access to information by or on behalf of Canada in connection with the Work, pursuant to Contract Serial No.

\_\_\_\_\_ between Her Majesty the Queen in right of Canada, represented by the Minister of Public Works and Government Services and Canada Border Services Agency, including any information that is confidential or proprietary to third parties, and information conceived, developed or produced by the Contractor as part of the Work. For the purposes of this agreement, information includes but not limited to: any documents, instructions, guidelines, data, material, advice or any other information whether received orally, in printed form, recorded electronically, or otherwise and whether or not labeled as proprietary or sensitive, that is disclosed to a person or that a person becomes aware of during the performance of the Contract.

I agree that I will not reproduce copy, use, divulge, release or disclose, in whole or in part, in whatever way or form any information described above to any person other than a person employed by Canada on a need to know basis. I undertake to safeguard the same and take all necessary and appropriate measures, including those set out in any written or oral instructions issued by Canada, to prevent the disclosure of or access to such information in contravention of this agreement.

I also acknowledge that any information provided to the Contractor by or on behalf of Canada must be used solely for the purpose of the Contract and must remain the property of Canada or a third party, as the case may be.

I agree that the obligation of this agreement will survive the completion of the Contract Serial No.:

---

\_\_\_\_\_  
Print name of proposed resource & sign above

---

Date

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## ANNEX B

### BASIS OF PAYMENT

#### 1. Professional Services

In accordance with the Contract, the Contractor will be paid the following firm all-inclusive per diem rates for work performed pursuant to this Contract, Applicable Taxes extra.

| <b>INITIAL CONTRACT PERIOD</b><br><b>(2 YEARS)</b> |                           |                           |
|--|---------------------------|---------------------------|
| <b>Resource Category</b>                           | <b>Level of Expertise</b> | <b>Firm Per Diem Rate</b> |
| GIS Application Architect                          | LEVEL 2                   | -----                     |
| GIS Application Architect                          | LEVEL 3                   | -----                     |
| GIS Data Architect                                 | LEVEL 2                   | -----                     |
| GIS Data Architect                                 | LEVEL 3                   | -----                     |
| GIS System Architect                               | LEVEL 2                   | -----                     |
| GIS System Architect                               | LEVEL 3                   | -----                     |
| PIA Specialist                                     | LEVEL 2                   | -----                     |
| PIA Specialist                                     | LEVEL 3                   | -----                     |

| <b>OPTION YEAR 1</b><br><b>(1 YEAR)</b> |                           |                           |
|---|---------------------------|---------------------------|
| <b>Resource Category</b>                | <b>Level of Expertise</b> | <b>Firm Per Diem Rate</b> |
| GIS Application Architect               | LEVEL 2                   | -----                     |
| GIS Application Architect               | LEVEL 3                   | -----                     |
| GIS Data Architect                      | LEVEL 2                   | -----                     |
| GIS Data Architect                      | LEVEL 3                   | -----                     |
| GIS System Architect                    | LEVEL 2                   | -----                     |
| GIS System Architect                    | LEVEL 3                   | -----                     |
| PIA Specialist                          | LEVEL 2                   | -----                     |
| PIA Specialist                          | LEVEL 3                   | -----                     |

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| <b>OPTION YEAR 2</b><br><b>(1 YEAR)</b> |                           |                           |
|---|---------------------------|---------------------------|
| <b>Resource Category</b>                | <b>Level of Expertise</b> | <b>Firm Per Diem Rate</b> |
| GIS Application Architect               | LEVEL 2                   | -----                     |
| GIS Application Architect               | LEVEL 3                   | -----                     |
| GIS Data Architect                      | LEVEL 2                   | -----                     |
| GIS Data Architect                      | LEVEL 3                   | -----                     |
| GIS System Architect                    | LEVEL 2                   | -----                     |
| GIS System Architect                    | LEVEL 3                   | -----                     |
| PIA Specialist                          | LEVEL 2                   | -----                     |
| PIA Specialist                          | LEVEL 3                   | -----                     |

| <b>OPTION YEAR 3</b><br><b>(1 YEAR)</b> |                           |                           |
|---|---------------------------|---------------------------|
| <b>Resource Category</b>                | <b>Level of Expertise</b> | <b>Firm Per Diem Rate</b> |
| GIS Application Architect               | LEVEL 2                   | -----                     |
| GIS Application Architect               | LEVEL 3                   | -----                     |
| GIS Data Architect                      | LEVEL 2                   | -----                     |
| GIS Data Architect                      | LEVEL 3                   | -----                     |
| GIS System Architect                    | LEVEL 2                   | -----                     |
| GIS System Architect                    | LEVEL 3                   | -----                     |
| PIA Specialist                          | LEVEL 2                   | -----                     |
| PIA Specialist                          | LEVEL 3                   | -----                     |

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**ANNEX C**  
**SECURITY REQUIREMENTS CHECK LIST**

**(SEE ATTACHED DOCUMENT)**

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# Annex A

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## Statement of Work

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## 1. BACKGROUND

CBSA Information, Science and Technology Branch (ISTB) has identified the need to establish a strategic IT Professional Services Supply Chain to support the Agency's Enterprise Architecture, Information Management & Common Services division's IT requirement relating to Open Government and Data Analytics in the following functional areas:

- Business Analytics Competency Centre (BACC)
- Business Intelligence and Analytics Service (BIAS)
- Business Reporting Support
- Data Services Portfolio Manager.

## 2. SCOPE OF WORK

The contractor will provide IT professional services resources to supplement and support the staff currently in place on various CBSA initiatives, and work on high performance, high availability, and mission critical national systems, built on the IT Environment identified in Section 4 below. The scope of work is in support of the following CBSA initiatives and systems:

1. Initiatives within the Agency's Enterprise Architecture, Information Management & Common Services division's mandate include but are not limited to:
  - a. Commercial Business Intelligence and Analytics
  - b. Travellers Business Intelligence and Analytics
  - c. Corporate Business Intelligence and Analytics.
2. CBSA Systems include but are not limited to:
  - a. Consolidated Management Reporting System (CMRS)
  - b. Rapid Stats
  - c. Data warehouse
  - d. Master Data Management.

The work to be performed will be on an "as and when requested" basis as initiated through the issuance of Task Authorizations. Task Authorizations may be issued for any of the following resource categories:

| Resource Category         | Level   |
|---------------------------|---------|
| GIS Application Architect | 2 and 3 |
| GIS Data Architect        | 2 and 3 |
| GIS System Architect      | 2 and 3 |
| PIA Specialist            | 2 and 3 |

### 3. TASKS

#### **3.1 GIS Application Architect (Level 2)**

Responsibilities include all of the following Baseline Tasks along with any combination of the following Additional Tasks, without limitation:

**Baseline Tasks:**

1. Designing and developing the application architecture for the project, in the context of the overall system architecture.
2. Defining the application tiers, frameworks, components types and interfaces.
3. Identifying key business and technology drivers that impact application architectures, such as end-user community requirements, existing software distribution capabilities, existing application environment (including legacy and packaged systems), and performance and availability requirements, and designing application architecture to meet these considerations.

**Additional Tasks** could include but are not limited to:

4. Specifying and providing ownership of reusable application components or reusable application code.
5. Defining strategies and plans for application rationalization and retirement in the context of the project's phasing strategy.
6. Monitoring and supporting the development of the system's applications to ensure they are compliant with the application architecture, and refines the application architecture as required.

#### **3.2 GIS Application Architect (Level 3)**

Responsibilities include all of the following Baseline Tasks along with any combination of the following Additional Tasks, without limitation:

**Baseline Tasks:**

1. Designing and developing the application architecture for the project, in the context of the overall system architecture.
2. Selecting the paradigm and technology for application program-to-program communication (APPC) among the components.
3. Defining the application tiers, frameworks, components types and interfaces.
4. Specifying and providing ownership of reusable application components or reusable application code.

**Additional Tasks** could include but are not limited to:

5. Identifying key business and technology drivers that impact application architectures, such as end-user community requirements, existing software distribution capabilities, existing application environment (including legacy and packaged systems), and performance and availability requirements, and designing application architecture to meet these considerations.
6. Defining strategies and plans for application rationalization and retirement in the context of the project's phasing strategy.
7. Leading and reviewing the application architecture.

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- 8. Monitoring and supporting the development of the system's applications to ensure they are compliant with the application architecture, and refines the application architecture as required.
- 9. Status reporting.

### **3.3 GIS Data Architect (Level 2)**

Responsibilities include all of the following Baseline Tasks along with any combination of the following Additional Tasks, without limitation:

**Baseline Tasks:**

- 1. Designing and developing the data architecture for the project, in the context of the overall system architecture.
- 2. Specifying recommended Data Base Management System (DBMS) and Extract, Load, Transform (ELT) tools and technologies for structured and unstructured content.
- 3. Creating a data model for the project that is independent of the technology solution.

**Additional Tasks** could include but are not limited to:

- 4. Setting Data Policy and the technical solution for the management, storage, access, navigation, movement, and transformation of data.
- 5. Designing the Metadata Repository.
- 6. Examining and enforcing opportunities to provide data reuse, balancing the issues of centralization and replication.
- 7. Ensuring the preservation of strategic data assets as applications and technologies evolve.

### **3.4 GIS Data Architect (Level 3)**

Responsibilities include all of the following Baseline Tasks along with any combination of the following Additional Tasks, without limitation:

**Baseline Tasks:**

- 1. Designing and developing the data architecture for the project, in the context of the overall system architecture, and high availability requirements.
- 2. Setting Data Policy and the technical solution for the management, storage, access, navigation, movement, and transformation of data.
- 3. Specifying recommended DBMS and Extract, Load, Transform (ELT) tools and technologies for structured and unstructured content.
- 4. Data asset gap analysis, identifying and prioritizing data ingestion candidates.

**Additional Tasks** could include but are not limited to:

- 5. Designing the Metadata Repository.
- 6. Creating a data model for the project that is independent of the technology solution.
- 7. Examining and enforcing opportunities to provide data reuse, balancing the issues of centralization and replication.
- 8. Ensuring the preservation of strategic data assets as applications and technologies evolve.
- 9. Monitoring and supporting the development of the system's data to ensure it is compliant with the data architecture, and refine the data architecture as required.
- 10. Status reporting.

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### **3.5 GIS System Architect (Level 2)**

Responsibilities include all of the following Baseline Tasks along with any combination of the following Additional Tasks, without limitation:

**Baseline Tasks:**

1. Designing the overall target architecture of the IT system to meet the formally established requirements (functional and non-functional) of a project.
2. Ensuring the integration of the system's component architectures – data, application, infrastructure, etc., into the overall target system architecture.
3. Establishing phased project plans that lead to a completed target architecture.

**Additional Tasks** could include but are not limited to:

4. Monitoring and supporting the development of the system to ensure it is compliant with the target architecture and refining the target architecture as required.
5. Ensuring the integration of the system architecture into the sponsoring organization's enterprise architecture.
6. Ensuring the systems overall viability throughout the systems development and implementation phases.
7. Balancing trade-offs between requirements and costs for the system and communicating the issues to the Technical Authority.

### **3.6 GIS System Architect (Level 3)**

Responsibilities include all of the following Baseline Tasks along with any combination of the following Additional Tasks, without limitation:

**Baseline Tasks:**

1. Designing the overall target architecture of the IT system to meet the formally established requirements (functional and non-functional) of a project.
2. Ensuring the integration of the system's component architectures – data, application, infrastructure, etc., into the overall target system architecture.
3. Ensuring the integration of the system architecture into the sponsoring organization's enterprise architecture.
4. Analysis and recommendations data visualization tools and technology.

**Additional Tasks** could include but are not limited to:

5. Monitoring and supporting the development of the system to ensure it is compliant with the target architecture and refining the target architecture as required.
6. Establishing phased project plans that lead to a completed target architecture.
7. Leading the development of architecture Guiding Principles and architecture blueprints.
8. Ensuring the systems overall viability throughout the systems development and implementation phases.
9. Balancing trade-offs between requirements and costs for the system and communicating the issues to the Technical Authority.

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10. Surveying emerging developments, new technologies, standards and methodologies that will have a positive impact on the system architecture, and incorporating these into the system architecture.
11. Status reporting.

### **3.7 PIA Specialist (Level 2)**

Responsibilities include all of the following Baseline Tasks along with any combination of the following Additional Tasks, without limitation:

**Baseline Tasks:**

1. Conduct privacy impact assessments (PIAs) and preliminary privacy impact assessments (PPIAs) of projects and concepts, in accordance with the requirements of:
  - o Treasury Board Privacy Impact Assessment Policy;
  - o Treasury Board Privacy Impact Assessment Policy Guidelines; and
  - o Other relevant standards, procedures and guidelines applicable to Data Analytics initiatives.
2. Analyze the flow of information using the PIA model provided by the client.
3. Conduct privacy analysis to provide evidence of compliance with privacy principles and to identify privacy risks.

**Additional Tasks** could include but are not limited to:

4. Review, analyze, or apply Treasury Board and Privacy Commissioner's Office standards in PIAs.
5. Develop Privacy Risk Management Plans.
6. Develop recommendations as to possible privacy risk mitigation strategies.
7. Complete tasks directly supporting the departmental IT Security and Cyber Protection Program.

### **3.8 PIA Specialist (Level 3)**

Responsibilities include all of the following Baseline Tasks along with any combination of the following Additional Tasks, without limitation:

**Baseline Tasks:**

1. Review, analyze, or apply Treasury Board and Privacy Commissioner's Office standards in privacy impact assessments (PIAs).
2. Develop Privacy Risk Management Plans.
3. Coordinate the review of privacy impact assessment initiatives with the Office Privacy Commissioner.

**Additional Tasks** could include but are not limited to:

4. Conduct PIAs and preliminary privacy impact assessments (PPIAs) of projects and concepts, in accordance with the requirements of:
  - o Treasury Board Privacy Impact Assessment Policy;
  - o Treasury Board Privacy Impact Assessment Policy Guidelines; and
  - o Other relevant standards, procedures and guidelines applicable to Data Analytics initiatives.
5. Analyze the flow of information using the PIA model provided by the client.

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- 6. Conduct privacy analysis to provide evidence of compliance with privacy principles and to identify privacy risks.
- 7. Complete tasks directly supporting the departmental IT Security and Cyber Protection Program.
- 8. Status reporting.
- 9. Process improvement, coaching, and mentoring teams' members and users on best practices and provide knowledge transfer.

#### **4. TECHNICAL ENVIRONMENT**

- 1. IBM DB2 on UNIX
- 2. IBM PureData
- 3. IBM InfoSphere Suite
- 4. IBM InfoSphere Change Data Capture
- 5. IBM InfoSphere Data Architect
- 6. IBM SPSS
- 7. IBM SPSS Modeler Server
- 8. IBM Cognos Framework Manager
- 9. IBM Cognos Business Intelligence Transformer
- 10. IBM Cognos Administration
- 11. IBM Cognos PowerPlay Studio
- 12. IBM Cognos Software Development Kit
- 13. SQL
- 14. Sybase
- 15. XML
- 16. R
- 17. Python
- 18. ArcGIS
- 19. MS Office.

#### **5. CLIENT SUPPORT**

The CBSA Data Management team will provide an appropriate workspace with access to the appropriate tools for the resources to carry out the expectations set out in this SOW.

The contractor will be provided with a CBSA user ID, password, workstation or laptop, email address, and other materials (supporting documentation) as required in order to process, store, or transmit CBSA data on the CBSA network during the contract. The use of contractor IT systems is not permitted.

#### **6. DELIVERABLES**

The Contractor will provide various reports, plans, analysis and other related documents as specified in the applicable Task Authorization. All deliverables are to be submitted in English and as described in each Task Authorization.

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## **7. CONSTRAINTS**

At no time and in no way is CBSA data to be removed from CBSA sites, nor will access to or from the contractor's IT systems through the use of a session (e.g VPN) be permitted.

The Contractor must comply with CBSA internal security policies, directives, standards, and guidelines at all times during the contract.

## **8. REPORTING REQUIREMENTS**

Timesheets are to be provided monthly depicting hours worked on a daily basis.

## **9. WORK LOCATION**

All work will be performed in the National Capital Region on-site at CBSA offices.

The current Primary Office location is 333 North River Rd Ottawa, Ontario.

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## GLOSSARY

| Acronym or Term                            | Definition  |
|--|---|
| Business Cases                             | A presentation or a proposal to an authority by an organization seeking funding, approval, or both for an activity, initiative, or project. A business case puts a proposed investment decision into a strategic context and provides the information necessary to make an informed decision about whether to proceed with the investment and in what form. |
| Business Intelligence                      | The strategies and technologies used by enterprises for the data analysis of business information. BI technologies provide historical, current and predictive views of business operations.   |
| Business Process Reengineering             | A business management strategy focusing on the analysis and design of workflows and business processes within an organization.  |
| Business Transformation Enablement Program | A set of tools which have been developed to provide an integrated approach for strategic management and alignment, and business transformation.   |
| Critical Success Factors                   | A management term for an element that is necessary for an organization or project to achieve its mission.   |
| Data Analytics                             | The process of examining data sets in order to draw conclusions about the information they contain.   |
| Architecture and Data Model                | An abstract model that organizes elements of data and standardizes how they relate to one another and to properties of the real world entities.   |
| Data Policy                                | A set of measurable rules for a set of data elements, in the context of an organizational scope, for the benefit of a business process, irrespective of where the data is stored and the party that provides the data.  |
| Data Base Management System                | A software package designed to define, manipulate, retrieve and manage data in a database.  |
| Extract, Load, Transform                   | A data integration process for transferring raw data from source systems to a target database and then preparing the information for downstream uses.   |
| Federated Architecture Program             | A pattern in enterprise architecture that allows interoperability and information sharing between semi-autonomous de-centrally organized lines of business (LOBs), information technology systems and applications.   |
| Guiding Principles                         | Principles or precepts that guide an organization throughout its life in all circumstances, irrespective of changes in its goals, strategies, type of work, or the top management.  |
| Information and Communications Technology  | A term for information technology (IT) which stresses the role of unified communications[1] and the integration of telecommunications (telephone lines and wireless signals), computers as well as necessary enterprise software, middleware, storage, and audio-visual systems, which enable users to access, store, transmit, and manipulate information. |
| Information Architecture                   | The structural design of shared information environments; the art and science of organizing and labelling websites, intranets, online communities and software to support usability and findability; and an emerging  |

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|                                      |   |
|--------------------------------------|---|
|                                      | community of practice focused on bringing principles of design and architecture to the digital landscape.   |
| Information Technology Architectures | The process of development of methodical information technology specifications, models and guidelines, using a variety of Information Technology notations, for example UML, within a coherent Information Technology architecture framework, following formal and informal Information Technology solution, enterprise, and infrastructure architecture processes.   |
| Integrated Data Warehouse            | A unified database that holds all the business information of an organization and makes it accessible all across the organization.  |
| Memorandum to Cabinet                | A minister's vehicle for proposing and explaining a proposed measure to the Cabinet and for obtaining its approval.   |
| Metadata Repository                  | A database created to store metadata. Metadata is information about the structures that contain the actual data. Metadata is often said to be "data about data", but this is misleading. Data profiles are an example of actual "data about data". Metadata is one layer of abstraction removed from this – it is data about the structures that contain data. Metadata may describe the structure of any data, of any subject, stored in any format. |
| Project Charters                     | A statement of the scope, objectives, and participants in a project. It provides a preliminary delineation of roles and responsibilities, outlines the project objectives, identifies the main stakeholders, and defines the authority of the project manager.  |
| Prototypes                           | An original or first model from which other forms are copied or developed.  |
| Self-Serve BI and Analytics          | An approach to data analytics that enables business users to access and work with corporate data even though they do not have a background in statistical analysis, business intelligence (BI) or data mining.<br><br>Self-Service Analytics is an approach to advanced analytics that allows business users to manipulate data to spot business opportunities, without requiring them to have a background in statistics or technology.              |
| Strategic Business Objectives        | Goals deemed most important to the current and future health of an organization.  |
| Technology Architecture              | The process of development of methodical information technology specifications, models and guidelines, using a variety of Information Technology notations, for example UML, within a coherent Information Technology architecture framework, following formal and informal Information Technology solution, enterprise, and infrastructure architecture processes.   |
| World Customs Organization           | The World Customs Organization (WCO), established in 1952 as the Customs Co-operation Council (CCC) is an independent intergovernmental body whose mission is to enhance the effectiveness and efficiency of Customs administrations.<br><a href="http://www.wcoomd.org/">http://www.wcoomd.org/</a>  |



## TASK AUTHORIZATION FORM FORMULAIRE D'AUTORISATION DE TÂCHES

### **PART 1** (completed by the Technical/Project Authority) / **PARTIE 1** (complété par le Responsable technique / Chargé du projet)

| <b>A. General Information / Informations générales</b>               |                           |                                      |                                       |   |
|--|---------------------------|--------------------------------------|---------------------------------------|---|
| Contract Number / Numéro du contrat :                                |                           |                                      |                                       |   |
| Contractor Name / Nom du Contracteur :                               |                           |                                      |                                       |   |
| Task Authorization (TA) No.<br>Nº de l'autorisation de tâches (AT) : | STOT No.<br>Nº de l'EDT : | Financial Coding<br>Code financier : | Date of Issuance<br>Date d'émission : | Response required by<br>Réponse requise<br>d'ici le : |
|  |                           |                                      |                                       |   |

| <b>B. For Amendments Only / Aux fins de modification seulement</b> |  |  |  |  |
|--|--|--|--|--|
| Amendment No. / N° de la modification :                            |  |  |  |  |
| Reason for the Amendment / Raison pour la modification :           |  |  |  |  |

| <b>C. TA Requirements / Exigences relatives à l'AT</b>  |  |   |  |  |
|---|--|---|--|--|
| Required Resource(s) / Ressource(s) requise(s)  |  |   |  |  |
| Category and Level<br>Catégorie et Niveau   | Estimated Level of Effort (days) / Niveau d'effort estimatif (jours) | Linguistic Profile / Profile linguistique | Required Level(s) of Security / Niveau(x) de sécurité requis |  |
|   |  |   |  |  |
| Statement of Work (tasks, deliverables, reports, etc.) / Énoncé des travaux (tâches, livrables, rapports, etc.) |  |   |  |  |
| See attached / Voir pièce jointe  |  |   |  |  |

| <b>Period of Services / Période de service:</b>  |   |   |  |  |
|--|---|---|--|--|
| Initial Start Date / Date de début initiale :  |   | Initial End Date / Date de fin initiale : |  |  |
| Extended End Date (See Reason for the Amendment) / Date de fin prolongée (voir Raison pour la modification): |   |   |  |  |
| <input type="checkbox"/> Option To Extend Initial End Date / Option pour prolonger la date de fin initiale   |   |   |  |  |
| Optional End Date(S) / Date(s) de fin optionnelle(s)   | Status / Statut   |   |  |  |
|  | <input checked="" type="radio"/> In Effect / en vigueur |   |  |  |
| Travel Requirement(s) / Exigence(s) de voyage : n/a  |   |   |  |  |
| Work Location(s) / Lieu(x) de travail :  |   |   |  |  |

### **PART 2** (completed by the Contractor and/or the Technical/Project Authority) / **PARTIE 2** (complété par le Contracteur et/ou le Responsable technique / Chargé du projet)

| <b>Contractor Resource(s) and Estimated Cost / Ressource(s) du Contracteur et Coût total estimatif</b>  |   |   |                                    |  |  |
|---|---|---|------------------------------------|--|--|
| Note: once approved, only the following resources may provide services under this TA. / Nota : une fois approuvée, seules les ressources suivantes peuvent fournir des services sous la présente AT |   |   |                                    |  |  |
| Name / Nom<br>Category and Level / Catégorie et Niveau  | PWGSC Security File No. /<br>Nº du dossier de sécurité<br>TPSGC | Linguistic Profile /<br>Profil linguistique | Per Diem Rate /<br>Taux journalier | Estimated Level of Effort (days) / Niveau d'effort estimatif (jours) | Total Estimated Cost /<br>Coût total estimatif |
| 0   |   |   |                                    |  | \$0.00   |
| 0   |   |   |                                    |  | \$0.00   |

|   |  |   |
|---|--|---|
|   | Estimated Cost / Coût estimatif                            | \$0.00  |
| Total Estimated Travel and Living Cost / Coût total estimatif de voyage et de vie |  | \$0.00  |
| <b>Total Estimated Cost / Coût total estimatif</b>                                |  | <b>\$0.00</b>   |
| Check applicable Basis of Payment /<br>Cocher la Base de Paiement applicable :    | Maximum Price /<br>Prix Maximum : <input type="checkbox"/> | Firm Price /<br>Prix Ferme : <input type="checkbox"/> |

### PART 3 - TA APPROVAL BY CANADA / PARTIE 3 - APPROBATION DE L'AT PAR LE CANADA

By signing this TA, the Technical Authority, the representative from the SPMMD of CBSA and/or the PWGSC Contracting Authority certify(ies) that the content of this TA is in accordance with the conditions of the Contract.

The client's authorization limit is \$250,000. When the value of a TA and its amendments (excluding Applicable Taxes) is in excess of this limit, the TA must be signed by the authorized client and forwarded to the PWGSC Contracting Authority for authorization.

En apposant sa signature sur l'AT, l'autorité technique, le représentant de la DAGBS de l'ASFC et/ou l'autorité contractante de TPSGC atteste(nt) que le contenu de cette AT est conforme aux conditions du contrat.

La limite d'autorisation du client est \$250,000. Lorsque la valeur de l'AT et ses modifications (excluant les taxes applicables) dépasse cette limite, l'AT doit être signée par le client autorisé et transmise à l'autorité contractante de TPSGC pour autorisation.

Name of Technical Authority / Nom de l'autorité technique Date Name of Contracting Authority / Nom de l'autorité contractante Date

Signature

Signature

Name of the representative from the SPMMD of CBSA /  
Nom d'un représentant de la DAGBS de l'ASFC Date

Signature

### PART 4 - CONTRACTOR SIGNATURE / PARTIE 4 - SIGNATURE DU CONTRACTEUR

Name and Title of individual authorized to sign on behalf of the Contractor /  
Nom et titre Signature de la personne autorisée à signer au nom de l'entrepreneur Signature Date

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## APPENDIX C TO ANNEX A RESOURCES ASSESSMENT CRITERIA AND RESPONSE TABLE

To facilitate resource assessment, Contractors must prepare and submit a response to a draft Task Authorization using the tables provided in this Appendix. When completing the resource grids, the specific information which demonstrates the requested criteria and reference to the page or project number of the résumé should be incorporated so that Canada can verify this information. The tables should not contain all the project information from the resume. Only the specific answer should be provided.

The following provides a guide as to how to complete this Appendix:

This Appendix is structured into 4 components:

1. Resource Technology and Certification Requirements;
2. Resource Mandatory Criteria;
3. Resource Point-Rated Criteria; and
4. Evaluation Grid and Weights (for Resource Point-Rated Criteria).

Draft TA preparation by CBSA:

Prior to issuing a draft TA, CBSA will complete the following elements.

1. Resource Technology and Certification Requirements, CBSA will identify:
  - a. The resource category and level.
  - b. Applicable technologies: these can be Essential (E) or Desirable (D). An "E" or "D" must be inserted next to the applicable technology(ies).
  - c. Applicable certifications, if any: these can be Desirable (D) only. Where a certification(s) is(are) applicable, a "D" must be inserted next to the applicable Certification(s).
2. Resource Point-Rated Criteria: CBSA will identify the Rated requirements (R1-R4) applicable to the draft TA.
3. Evaluation Grid and Weights: CBSA will complete the applicable grid elements and weights.

Key boundaries:

- a. Up to the maximum number of technologies identified as Essential in the table below can be requested in a draft TA; and
- b. No more than 50% of overall weight per Rated Requirement.

Response by the Contractor:

In response, the Contractor must complete the following:

1. Resource name;
2. Responses to M1 and M2; and
3. Responses to applicable R1-R4.

Evaluation:

An example of evaluation is provided under the table below.

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| Resource Category                                     | Level | Total # of Technologies | Total # of Certifications* | Maximum # Technologies as Essential |
|---|-------|-------------------------|----------------------------|-------------------------------------|
| <b>Workstream 1</b>                                   |       |                         |                            |                                     |
| Enterprise Resource Planning (ERP) Functional Analyst | L2,L3 | 7                       | 1                          | 5                                   |
| Test Coordinator                                      | L2,L3 | 19                      | 0                          | 3                                   |
| Tester  | L3    | 19                      | 0                          | 3                                   |
| Data Conversion Specialist                            | L2,L3 | 10                      | 3                          | 2                                   |
| Database Modeller / IM Modeller                       | L3    | 10                      | 3                          | 2                                   |
| IM Architect  | L3    | 19                      | 2                          | 2                                   |
| Technology Architect                                  | L3    | 15                      | 4                          | 2                                   |
| Enterprise Architect                                  | L3    | 15                      | 4                          | 2                                   |
| Business Analyst                                      | L2,L3 | 6                       | 2                          | 2                                   |
| Technical Writer                                      | L2,L3 | 2                       | 0                          | 1                                   |
| Project Executive                                     | L3    | 3                       | 4                          | 2                                   |
| Project Coordinator                                   | L3    | 3                       | 1                          | 2                                   |
| Project Manager                                       | L2,L3 | 3                       | 4                          | 2                                   |
| <b>Workstream 2</b>                                   |       |                         |                            |                                     |
| GIS Application Architect                             | L2,L3 | 4                       | 1                          | 2                                   |
| GIS Data Architect                                    | L2,L3 | 4                       | 1                          | 2                                   |
| GIS System Architect                                  | L2,L3 | 4                       | 1                          | 2                                   |
| PIA Specialist  | L2,L3 | 2                       | 3                          | 1                                   |

**\*All Certifications must be Desirable only.**

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## EXAMPLE - EVALUATION

For this scenario, CBSA wants to request a Data Conversion Specialist - Level 2, with the following Technology and Certification requirements:

- Essential Technology Requirements (no more than 2 for this category):

- (1) MS Office Suite (Word, Excel, PowerPoint)
- (2) IBM InfoSphere Data Architect

- Desirable Technology Requirements:

- (1) IBM PureData
- (2) IBM DB2 V9+

- Desirable Certification Requirement:

- (1) ITIL V3 Certification

The proposed resource has 75 months experience within the past 7 years of the draft TA issuance date executing at least 60% of the tasks enumerated at Article 3 of Annex A for a Data Conversion Specialist - Level 2.

Based on the experience submitted under M1, the proposed resource has 30 months within the past 48 months of the draft TA issuance date using IBM InfoSphere Data Architect.

Based on the experience submitted under M1, the proposed resource has 44 months within the past 48 months of the draft TA issuance date using MS Office Suite (Word, Excel, Powerpoint).

The proposed resource has 18 months experience using IBM PureData.

The proposed resource has 18 months experience using IBM DB2 V9+.

The proposed resource holds the Certification ITIL V3 Certification.

For this scenario and based on the evaluation weight per criterion determined by the Client, the resource proposed by ABC Inc. would achieve a score of 76.50% and be deemed responsive.

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### Data Conversion Specialist

TA #: X

Contractor Name: ABC Inc.

Proposed Resource Name: John Doe

Level:  2  
 3

### 1. RESOURCE TECHNOLOGY AND CERTIFICATION REQUIREMENTS

#### RESOURCE ESSENTIAL (E) DESIRABLE (D) TECHNOLOGY REQUIREMENT(S)

|                                       |                               |
|---------------------------------------|-------------------------------|
| <input checked="" type="checkbox"/> E | IBM InfoSphere Data Architect |
| <input type="checkbox"/>              | CA Erwin Data Modeler V9+     |
| <input type="checkbox"/>              | IBM Data Studio V4+           |
| <input checked="" type="checkbox"/> D | IBM PureData                  |
| <input checked="" type="checkbox"/> D | IBM DB2 V9+                   |
| <input type="checkbox"/>              | SQL                           |
| <input type="checkbox"/>              | XML                           |

|                                       |   |
|---------------------------------------|---|
| <input checked="" type="checkbox"/> E | MS Office Suite (Word, Excel, PowerPoint) |
| <input type="checkbox"/>              | MS Visio                                  |
| <input type="checkbox"/>              | Kimball Dimensional Methodology           |

#### RESOURCE DESIRABLE (D) CERTIFICATION REQUIREMENT(S)

|                                       |   |
|---------------------------------------|---|
| <input type="checkbox"/>              | Certified Business Intelligence Professional (CBIP) |
| <input type="checkbox"/>              | IBM Certified Data Architect - Big Data             |
| <input checked="" type="checkbox"/> D | ITIL V3 Certification                               |

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## 2. RESOURCE MANDATORY CRITERIA

| ID | Mandatory Criteria   | Bidder's response |   |
|----|--|-------------------|---|
|    |  | Met<br>(Yes/No)   | Demonstrated Experience<br>(Bidders to insert cross reference to<br>assigned resource project reference<br>number(s)) |
| M1 | <p>The Contractor must demonstrate that the proposed resource has the minimum number of years of experience specified below:</p> <p><b>For Level 2 resource categories the requirement is as follows:</b> The resource must have 5 years experience within the past 7 years of the draft TA issuance date executing at least 60% of the tasks enumerated at Article 3 of Annex A for the specific resource category identified in the draft TA.</p> <p><b>For Level 3 resource categories the requirement is as follows:</b> The resource must have 10 years experience within the past 15 years of the draft TA issuance date executing at least 60% of the tasks enumerated at Article 3 of Annex A for the specific resource category identified in the draft TA.</p> | Yes               |   |
| M2 | <p>The Contractor must demonstrate that the proposed resource's experience submitted under M1 includes the minimum number of months of experience specified below:</p> <p><b>For Level 2 resource categories the requirement is as follows:</b> The resource must have 2 years experience within the past 4 years of the draft TA issuance date using the technology(ies) identified as Essential (E).</p> <p><b>For Level 3 resource categories the requirement is as follows:</b> The resource must have 4 years experience within the past 8 years of the draft TA issuance date using the technology(ies) identified as Essential (E).</p>   | Yes               |   |

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**3. RESOURCE POINT-RATED CRITERIA**

| ID | Applicable or not?<br>(Client to insert "X" in boxes for the criteria that apply)   | Point Rated Criteria   | Max Points      | Point Allocation Grid   | Bidder's response   |
|----|---|--|-----------------|---|---|
|    |   |  |                 |   | Demonstrated Experience<br>(Bidders to insert cross reference to assigned resource project reference number(s)) |
| R1 |    | Points will be awarded for experience over and above the required in M1.   | 10              | <p><b>For Level 2 Resource:</b><br/>5+ to 6 years = 5 points<br/>6+ years = 10 points</p> <p><b>For Level 3 Resource:</b><br/>10+ to 11 years = 2 points<br/>11+ to 12 years = 4 points<br/>12+ to 13 years = 6 points<br/>13+ to 14 years = 8 points<br/>14+ years = 10 points</p> |   |
| R2 |    | Points will be awarded for experience over and above the required in M2.   | 10 per element* | <p><b>For each Element:</b></p> <p><b>For Level 2 Resource:</b><br/>2+ to 3 years = 5 points<br/>3+ years = 10 points</p> <p><b>For Level 3 Resource:</b><br/>4+ to 5 years = 3 points<br/>5+ to 6 years = 7 points<br/>6+ years = 10 points</p>                                    |   |
| R3 |  | The Contractor should demonstrate that the proposed resource has experience in each of the Technology (Element) identified as Desirable ("D"). | 10 per element* | <p><b>For each Element:</b></p> <p>0 to 1 year = 0 points<br/>1+ to 2 years = 2 points<br/>2+ to 3 years = 4 points<br/>3+ to 4 years = 6 points<br/>4+ to 5 years = 8 points<br/>5+ years = 10 points</p>  |   |

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|    |   |  |                 |  |  |
|----|---|--|-----------------|--|--|
| R4 |  | The Contractor should demonstrate that the proposed resource holds the Certification(s) (Element) identified as Desirable ("D"). | 10 per element* | The proposed resource is a holder of the certification = 10 points |  |
|----|---|--|-----------------|--|--|

\*Evaluation Weights (for R1 to R4) are identified at time of issuance of a draft TA and accompanies each TA:

#### 4. EVALUATION GRID AND WEIGHTS

| ID                                      |  | Max Points | Points Achieved by Contractor (A) | Evaluation Weight (B)<br><i>(to be completed at tasking time)</i> | Weighted Result<br>(A x B) |
|---|--|------------|-----------------------------------|---|----------------------------|
| R1                                      |  | 10         | 10                                | 35%   | 3.5                        |
| R2                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                            |
|   | IBM Infosphere Data Architect            | 10         | 5                                 | 15%   | 0.75                       |
| R3                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                            |
|   | IBM Pure Data                            | 10         | 2                                 | 10%   | 0.2                        |
| R4                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                            |
|   | IBM DB2 V9+                              | 10         | 2                                 | 10%   | 0.2                        |
|   | <i>(to be completed at tasking time)</i> |            |                                   |   |                            |
|   | ITIL V3 Certification                    | 10         | 10                                | 15%   | 1.5                        |
| Total Weight <b>(must equal 100%)</b> : |  |            | 100%                              |   |                            |
| Total Score**:                          |  |            |                                   | 76.50%  |                            |

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**\*\*Each proposed resource must meet the minimum pass mark of 70% to be deemed responsive.**

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**GIS Data Architect**

TA #: \_\_\_\_\_

Contractor Name: \_\_\_\_\_

Proposed Resource Name: \_\_\_\_\_

Level:  2  
 3

**1. RESOURCE TECHNOLOGY AND CERTIFICATION REQUIREMENTS**

**RESOURCE ESSENTIAL (E) DESIRABLE (D) TECHNOLOGY REQUIREMENT(S)**

GIS Product Suites  MS Office Suite (Word, Excel, PowerPoint)  MS Visio  
 ESRI /ArcGIS Suite

**RESOURCE DESIRABLE (D) CERTIFICATION REQUIREMENT(S)**

ESRI Enterprise System Design

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## 2. RESOURCE MANDATORY CRITERIA

| ID | Mandatory Criteria   | Bidder's response |   |
|----|--|-------------------|---|
|    |  | Met<br>(Yes/No)   | Demonstrated Experience<br>(Bidders to insert cross reference to<br>assigned resource project reference<br>number(s)) |
| M1 | <p>The Contractor must demonstrate that the proposed resource has the minimum number of years of experience specified below:</p> <p><b>For Level 2 resource categories the requirement is as follows:</b> The resource must have 5 years experience within the past 7 years of the draft TA issuance date executing at least 60% of the tasks enumerated at Article 3 of Annex A for the specific resource category identified in the draft TA.</p> <p><b>For Level 3 resource categories the requirement is as follows:</b> The resource must have 10 years experience within the past 15 years of the draft TA issuance date executing at least 60% of the tasks enumerated at Article 3 of Annex A for the specific resource category identified in the draft TA.</p> |                   |   |
| M2 | <p>The Contractor must demonstrate that the proposed resource's experience submitted under M1 includes the minimum number of months of experience specified below:</p> <p><b>For Level 2 resource categories the requirement is as follows:</b> The resource must have 2 years experience within the past 4 years of the draft TA issuance date using the technology(ies) identified as Essential (E).</p> <p><b>For Level 3 resource categories the requirement is as follows:</b> The resource must have 4 years experience within the past 8 years of the draft TA issuance date using the technology(ies) identified as Essential (E).</p>   |                   |   |

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### 3. RESOURCE POINT-RATED CRITERIA

| ID | Applicable or not?<br>(Client to insert "X" in boxes for the criteria that apply) | Point Rated Criteria   | Max Points      | Point Allocation Grid  | Bidder's response   |
|----|---|--|-----------------|--|---|
|    |   |  |                 |  | Demonstrated Experience<br>(Bidders to insert cross reference to assigned resource project reference number(s)) |
| R1 | <input type="checkbox"/>  | Points will be awarded for experience over and above the required in M1.   | 10              | <p>For Level 2 Resource:<br/>5+ to 6 years = 5 points<br/>6+ years = 10 points</p> <p>For Level 3 Resource:<br/>10+ to 11 years = 2 points<br/>11+ to 12 years = 4 points<br/>12+ to 13 years = 6 points<br/>13 + to 14 years = 8 points<br/>14+ years = 10 points</p> |   |
| R2 | <input type="checkbox"/>  | Points will be awarded for experience over and above the required in M2.   | 10 per element* | <p>For each Element:</p> <p>For Level 2 Resource:<br/>2+ to 3 years = 5 points<br/>3+ years = 10 points</p> <p>For Level 3 Resource:<br/>4+ to 5 years =3 points<br/>5+ to 6 years = 7 points<br/>6+ years = 10 points</p>   |   |
| R3 | <input type="checkbox"/>  | The Contractor should demonstrate that the proposed resource has experience in each of the Technology (Element) identified as Desirable ("D"). | 10 per element* | <p>For each Element:</p> <p>0 to 1 year = 0 points<br/>1+ to 2 years = 2 points<br/>2+ to 3 years = 4 points<br/>3+ to 4 years = 6 points<br/>4+ to 5 years = 8 points<br/>5+ years = 10 points</p>  |   |

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|    |                          |  |                        |  |  |
|----|--------------------------|--|------------------------|--|--|
| R4 | <input type="checkbox"/> | The Contractor should demonstrate that the proposed resource holds the Certification(s) (Element) identified as Desirable ("D"). | <b>10 per element*</b> | The proposed resource is a holder of the certification = 10 points |  |
|----|--------------------------|--|------------------------|--|--|

\*Evaluation Weights (for R1 to R4) are identified at time of issuance of a draft TA and accompanies each TA:

#### 4. EVALUATION GRID AND WEIGHTS

| ID                                      |  | Max Points | Points Achieved by Contractor (A) | Evaluation Weight (B)<br><i>(to be completed at tasking time)</i> | Weighted Result (A x B) |
|---|--|------------|-----------------------------------|---|-------------------------|
| R1                                      |  | 10         |                                   |   | 0                       |
| R2                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                         |
|   | Element 1                                | 10         |                                   |   | 0                       |
|   | Element 2                                | 10         |                                   |   | 0                       |
|   | Etc.                                     | 10         |                                   |   | 0                       |
| R3                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                         |
|   | Element 1                                | 10         |                                   |   | 0                       |
|   | Etc.                                     | 10         |                                   |   | 0                       |
| R4                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                         |
|   | Element 1                                | 10         |                                   |   | 0                       |
|   | Etc.                                     | 10         |                                   |   | 0                       |
| Total Weight <b>(must equal 100%)</b> : |  |            | 0%                                |   |                         |

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|                |    |
|----------------|----|
| Total Score**: | 0% |
|----------------|----|

\*\*Each proposed resource must meet the minimum pass mark of 70% to be deemed responsive.

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**GIS System Architect**

TA #: \_\_\_\_\_

Contractor Name: \_\_\_\_\_

Proposed Resource Name: \_\_\_\_\_

Level:  2  
 3

**1. RESOURCE TECHNOLOGY AND CERTIFICATION REQUIREMENTS**

**RESOURCE ESSENTIAL (E) DESIRABLE (D) TECHNOLOGY REQUIREMENT(S)**

GIS Product Suites  MS Office Suite (Word, Excel, PowerPoint)  MS Visio  
 ESRI /ArcGIS Suite

**RESOURCE DESIRABLE (D) CERTIFICATION REQUIREMENT(S)**

ESRI Enterprise System Design

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632el

## 2. RESOURCE MANDATORY CRITERIA

| ID | Mandatory Criteria   | Bidder's response |   |
|----|--|-------------------|---|
|    |  | Met<br>(Yes/No)   | Demonstrated Experience<br>(Bidders to insert cross reference to<br>assigned resource project reference<br>number(s)) |
| M1 | <p>The Contractor must demonstrate that the proposed resource has the minimum number of years of experience specified below:</p> <p><b>For Level 2 resource categories the requirement is as follows:</b> The resource must have 5 years experience within the past 7 years of the draft TA issuance date executing at least 60% of the tasks enumerated at Article 3 of Annex A for the specific resource category identified in the draft TA.</p> <p><b>For Level 3 resource categories the requirement is as follows:</b> The resource must have 10 years experience within the past 15 years of the draft TA issuance date executing at least 60% of the tasks enumerated at Article 3 of Annex A for the specific resource category identified in the draft TA.</p> |                   |   |
| M2 | <p>The Contractor must demonstrate that the proposed resource's experience submitted under M1 includes the minimum number of months of experience specified below:</p> <p><b>For Level 2 resource categories the requirement is as follows:</b> The resource must have 2 years experience within the past 4 years of the draft TA issuance date using the technology(ies) identified as Essential (E).</p> <p><b>For Level 3 resource categories the requirement is as follows:</b> The resource must have 4 years experience within the past 8 years of the draft TA issuance date using the technology(ies) identified as Essential (E).</p>   |                   |   |

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Contract No. - N° de contrat  
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Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
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**3. RESOURCE POINT-RATED CRITERIA**

| ID | Applicable or not?<br>(Client to insert "X" in boxes for the criteria that apply) | Point Rated Criteria   | Max Points      | Point Allocation Grid  | Bidder's response   |
|----|---|--|-----------------|--|---|
|    |   |  |                 |  | Demonstrated Experience<br>(Bidders to insert cross reference to assigned resource project reference number(s)) |
| R1 | <input type="checkbox"/>  | Points will be awarded for experience over and above the required in M1.   | 10              | <p>For Level 2 Resource:<br/>5+ to 6 years = 5 points<br/>6+ years = 10 points</p> <p>For Level 3 Resource:<br/>10+ to 11 years = 2 points<br/>11+ to 12 years = 4 points<br/>12+ to 13 years = 6 points<br/>13 + to 14 years = 8 points<br/>14+ years = 10 points</p> |   |
| R2 | <input type="checkbox"/>  | Points will be awarded for experience over and above the required in M2.   | 10 per element* | <p>For each Element:</p> <p>For Level 2 Resource:<br/>2+ to 3 years = 5 points<br/>3+ years = 10 points</p> <p>For Level 3 Resource:<br/>4+ to 5 years =3 points<br/>5+ to 6 years = 7 points<br/>6+ years = 10 points</p>   |   |
| R3 | <input type="checkbox"/>  | The Contractor should demonstrate that the proposed resource has experience in each of the Technology (Element) identified as Desirable ("D"). | 10 per element* | <p>For each Element:</p> <p>0 to 1 year = 0 points<br/>1+ to 2 years = 2 points<br/>2+ to 3 years = 4 points<br/>3+ to 4 years = 6 points<br/>4+ to 5 years = 8 points<br/>5+ years = 10 points</p>  |   |

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|    |                          |  |                        |  |  |
|----|--------------------------|--|------------------------|--|--|
| R4 | <input type="checkbox"/> | The Contractor should demonstrate that the proposed resource holds the Certification(s) (Element) identified as Desirable ("D"). | <b>10 per element*</b> | The proposed resource is a holder of the certification = 10 points |  |
|----|--------------------------|--|------------------------|--|--|

\*Evaluation Weights (for R1 to R4) are identified at time of issuance of a draft TA and accompanies each TA:

#### 4. EVALUATION GRID AND WEIGHTS

| ID   |  | Max Points | Points Achieved by Contractor (A) | Evaluation Weight (B)<br><i>(to be completed at tasking time)</i> | Weighted Result (A x B) |
|--|--|------------|-----------------------------------|---|-------------------------|
| R1   |  | 10         |                                   |   | 0                       |
| R2   | <i>(to be completed at tasking time)</i> |            |                                   |   |                         |
|  | Element 1                                | 10         |                                   |   | 0                       |
|  | Element 2                                | 10         |                                   |   | 0                       |
|  | Etc.                                     | 10         |                                   |   | 0                       |
| R3   | <i>(to be completed at tasking time)</i> |            |                                   |   |                         |
|  | Element 1                                | 10         |                                   |   | 0                       |
|  | Etc.                                     | 10         |                                   |   | 0                       |
| R4   | <i>(to be completed at tasking time)</i> |            |                                   |   |                         |
|  | Element 1                                | 10         |                                   |   | 0                       |
|  | Etc.                                     | 10         |                                   |   | 0                       |
| Total Weight <b><i>(must equal 100%)</i></b> : |  |            | 0%                                |   |                         |

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|                |    |
|----------------|----|
| Total Score**: | 0% |
|----------------|----|

\*\*Each proposed resource must meet the minimum pass mark of 70% to be deemed responsive.

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632el

**PIA Specialist**

TA #: \_\_\_\_\_

Contractor Name: \_\_\_\_\_

Proposed Resource Name: \_\_\_\_\_

Level:  2  
 3

**1. RESOURCE TECHNOLOGY AND CERTIFICATION REQUIREMENTS**

**RESOURCE ESSENTIAL (E) DESIRABLE (D) TECHNOLOGY REQUIREMENT(S)**

MS Visio  MS Office Suite (Word, Excel, PowerPoint)

**RESOURCE DESIRABLE (D) CERTIFICATION REQUIREMENT(S)**

Certified Information Privacy Professional (CIPP)  Certified Information Privacy Manager (CIPM)  Certified Information Privacy Technologist (CIPT)

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## 2. RESOURCE MANDATORY CRITERIA

| ID | Mandatory Criteria   | Bidder's response |   |
|----|--|-------------------|---|
|    |  | Met<br>(Yes/No)   | Demonstrated Experience<br>(Bidders to insert cross reference to<br>assigned resource project reference<br>number(s)) |
| M1 | <p>The Contractor must demonstrate that the proposed resource has the minimum number of years of experience specified below:</p> <p><b>For Level 2 resource categories the requirement is as follows:</b> The resource must have 5 years experience within the past 7 years of the draft TA issuance date executing at least 60% of the tasks enumerated at Article 3 of Annex A for the specific resource category identified in the draft TA.</p> <p><b>For Level 3 resource categories the requirement is as follows:</b> The resource must have 10 years experience within the past 15 years of the draft TA issuance date executing at least 60% of the tasks enumerated at Article 3 of Annex A for the specific resource category identified in the draft TA.</p> |                   |   |
| M2 | <p>The Contractor must demonstrate that the proposed resource's experience submitted under M1 includes the minimum number of months of experience specified below:</p> <p><b>For Level 2 resource categories the requirement is as follows:</b> The resource must have 2 years experience within the past 4 years of the draft TA issuance date using the technology(ies) identified as Essential (E).</p> <p><b>For Level 3 resource categories the requirement is as follows:</b> The resource must have 4 years experience within the past 8 years of the draft TA issuance date using the technology(ies) identified as Essential (E).</p>   |                   |   |

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Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
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### 3. RESOURCE POINT-RATED CRITERIA

| ID | Applicable or not?<br>(Client to insert "X" in boxes for the criteria that apply) | Point Rated Criteria   | Max Points      | Point Allocation Grid   | Bidder's response   |
|----|---|--|-----------------|---|---|
|    |   |  |                 |   | Demonstrated Experience<br>(Bidders to insert cross reference to assigned resource project reference number(s)) |
| R1 | <input type="checkbox"/>  | Points will be awarded for experience over and above the required in M1.   | 10              | <p><b>For Level 2 Resource:</b><br/>5+ to 6 years = 5 points<br/>6+ years = 10 points</p> <p><b>For Level 3 Resource:</b><br/>10+ to 11 years = 2 points<br/>11+ to 12 years = 4 points<br/>12+ to 13 years = 6 points<br/>13+ to 14 years = 8 points<br/>14+ years = 10 points</p> |   |
| R2 | <input type="checkbox"/>  | Points will be awarded for experience over and above the required in M2.   | 10 per element* | <p><b>For each Element:</b></p> <p><b>For Level 2 Resource:</b><br/>2+ to 3 years = 5 points<br/>3+ years = 10 points</p> <p><b>For Level 3 Resource:</b><br/>4+ to 5 years = 3 points<br/>5+ to 6 years = 7 points<br/>6+ years = 10 points</p>                                    |   |
| R3 | <input type="checkbox"/>  | The Contractor should demonstrate that the proposed resource has experience in each of the Technology (Element) identified as Desirable ("D"). | 10 per element* | <p><b>For each Element:</b></p> <p>0 to 1 year = 0 points<br/>1+ to 2 years = 2 points<br/>2+ to 3 years = 4 points<br/>3+ to 4 years = 6 points<br/>4+ to 5 years = 8 points<br/>5+ years = 10 points</p>  |   |

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|    |                          |  |                 |  |  |
|----|--------------------------|--|-----------------|--|--|
| R4 | <input type="checkbox"/> | The Contractor should demonstrate that the proposed resource holds the Certification(s) (Element) identified as Desirable ("D"). | 10 per element* | The proposed resource is a holder of the certification = 10 points |  |
|----|--------------------------|--|-----------------|--|--|

\*Evaluation Weights (for R1 to R4) are identified at time of issuance of a draft TA and accompanies each TA:

#### 4. EVALUATION GRID AND WEIGHTS

| ID                                      |  | Max Points | Points Achieved by Contractor (A) | Evaluation Weight (B)<br><i>(to be completed at tasking time)</i> | Weighted Result (A x B) |
|---|--|------------|-----------------------------------|---|-------------------------|
| R1                                      |  | 10         |                                   |   | 0                       |
| R2                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                         |
|   | Element 1                                | 10         |                                   |   | 0                       |
|   | Element 2                                | 10         |                                   |   | 0                       |
| R3                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                         |
|   | Element 1                                | 10         |                                   |   | 0                       |
|   | Etc.                                     | 10         |                                   |   | 0                       |
| R4                                      | <i>(to be completed at tasking time)</i> |            |                                   |   |                         |
|   | Element 1                                | 10         |                                   |   | 0                       |
|   | Etc.                                     | 10         |                                   |   | 0                       |
| Total Weight <i>(must equal 100%)</i> : |  |            | 0%                                |   |                         |

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|                |    |
|----------------|----|
| Total Score**: | 0% |
|----------------|----|

\*\*Each proposed resource must meet the minimum pass mark of 70% to be deemed responsive.

## COMMON-PS-SRCL#19



Government of Canada

Gouvernement du Canada

Contract Number / Numéro du contrat

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Security Classification / Classification de sécurité  
UNCLASSIFIED

## SECURITY REQUIREMENTS CHECK LIST (SRCL)

## LISTE DE VÉRIFICATION DES EXIGENCES RELATIVES À LA SÉCURITÉ (LVERS)

## PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE

|  |   |  |   |
|--|---|--|---|
| 1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine   | Canada Border Services Agency (CBSA)                                      | 2. Branch or Directorate / Direction générale ou Direction                                     | Information, Science and Technology Branch (ISTB)   |
| 3. a) Subcontract Number / Numéro du contrat de sous-traitance   | 3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant |  |   |
| 4. Brief Description of Work / Brève description du travail<br>IT Professional Services Supply Chain to support the Agency's Enterprise Architecture, Information Management & Common Services division's IT requirement relating to Open Government and Data Analytics in the following functional areas: Business Analytics Competency Centre (BACC), Business Intelligence and Analytics Service (BIAS), Business Reporting Support, and Data Services Portfolio Manager. |   |  |   |
| 5. a) Will the supplier require access to Controlled Goods?<br>Le fournisseur aura-t-il accès à des marchandises contrôlées?   |   |  |   |
| 5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations?<br>Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques?   |   |  |   |
| 6. Indicate the type of access required / Indiquer le type d'accès requis  |   |  |   |
| 6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets?<br>Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS?<br>(Specify the level of access using the chart in Question 7. c)<br>(Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c)   |   |  |   |
| 6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted.<br>Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé.  |   |  |   |
| 6. c) Is this a commercial courier or delivery requirement with no overnight storage?<br>S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit?  |   |  |   |
| 7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès   |   |  |   |
| Canada <input checked="" type="checkbox"/>   | NATO / OTAN <input type="checkbox"/>                                      | Foreign / Étranger <input type="checkbox"/>  |   |
| 7. b) Release restrictions / Restrictions relatives à la diffusion   |   |  |   |
| No release restrictions<br>Aucune restriction relative à la diffusion <input checked="" type="checkbox"/>  | All NATO countries<br>Tous les pays de l'OTAN <input type="checkbox"/>    | No release restrictions<br>Aucune restriction relative à la diffusion <input type="checkbox"/> |   |
| Not releasable<br>À ne pas diffuser <input type="checkbox"/>   | Restricted to: / Limité à: <input type="checkbox"/>                       | Restricted to: / Limité à: <input type="checkbox"/>  | Restricted to: / Limité à: <input type="checkbox"/> |
| Specify country(ies): / Préciser le(s) pays :  | Specify country(ies): / Préciser le(s) pays :                             | Specify country(ies): / Préciser le(s) pays :  | Specify country(ies): / Préciser le(s) pays :       |
| 7. c) Level of information / Niveau d'information  |   |  |   |
| PROTECTED A<br>PROTÉGÉ A <input checked="" type="checkbox"/>   | NATO UNCLASSIFIED<br>NATO NON CLASSIFIÉ <input type="checkbox"/>          | PROTECTED A<br>PROTÉGÉ A <input type="checkbox"/>  |   |
| PROTECTED B<br>PROTÉGÉ B <input checked="" type="checkbox"/>   | NATO RESTRICTED<br>NATO DIFFUSION RESTREINTE <input type="checkbox"/>     | PROTECTED B<br>PROTÉGÉ B <input type="checkbox"/>  |   |
| PROTECTED C<br>PROTÉGÉ C <input checked="" type="checkbox"/>   | NATO CONFIDENTIAL<br>NATO CONFIDENTIEL <input type="checkbox"/>           | PROTECTED C<br>PROTÉGÉ C <input type="checkbox"/>  |   |
| CONFIDENTIAL<br>CONFIDENTIEL <input checked="" type="checkbox"/>   | NATO SECRET<br>NATO SECRET <input type="checkbox"/>                       | CONFIDENTIAL<br>CONFIDENTIEL <input type="checkbox"/>  |   |
| SECRET<br>SECRET <input checked="" type="checkbox"/>   | COSMIC TOP SECRET<br>COSMIC TRÈS SECRET <input type="checkbox"/>          | SECRET<br>SECRET <input type="checkbox"/>  |   |
| TOP SECRET<br>TRÈS SECRET <input type="checkbox"/>   |   | TOP SECRET<br>TRÈS SECRET <input type="checkbox"/>   |   |
| TOP SECRET (SIGINT)<br>TRÈS SECRET (SIGINT) <input type="checkbox"/>   |   | TOP SECRET (SIGINT)<br>TRÈS SECRET (SIGINT) <input type="checkbox"/>                           |   |

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UNCLASSIFIED**PART A (continued) / PARTIE A (suite)**

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?

Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS?

If Yes, indicate the level of sensitivity:

Dans l'affirmative, indiquer le niveau de sensibilité :

9. Will the supplier require access to extremely sensitive INFOSEC information or assets?

Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate?

 No    Yes  
Non   Oui No    Yes  
Non   Oui

Short Title(s) of material / Titre(s) abrégé(s) du matériel :

Document Number / Numéro du document :

**PART B - PERSONNEL (SUPPLIER) / PARTIE B - PERSONNEL (FOURNISSEUR)**

10. a) Personnel security screening level required / Niveau de contrôle de la sécurité du personnel requis

 RELIABILITY STATUS

COTE DE FIABILITÉ

 CONFIDENTIAL

CONFIDENTIEL

 SECRET

SECRET

 TOP SECRET

TRÈS SECRET

 TOP SECRET- SIGINT

TRÈS SECRET - SIGINT

 NATO CONFIDENTIAL

NATO CONFIDENTIEL

 NATO SECRET

NATO SECRET

 COSMIC TOP SECRET

COSMIC TRÈS SECRET

 SITE ACCESS

ACCÈS AUX EMPLACEMENTS

Special comments:

Commentaires spéciaux :

NOTE. If multiple levels of screening are identified, a Security Classification Guide must be provided.

REMARQUE. Si plusieurs niveaux de contrôle de sécurité sont requis, un guide de classification de la sécurité doit être fourni.

10. b) May unscreened personnel be used for portions of the work?

Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail?

 No    Yes  
Non   Oui

If Yes, will unscreened personnel be escorted?

Dans l'affirmative, le personnel en question sera-t-il escorté?

 No    Yes  
Non   Oui**PART C - SAFEGUARDS (SUPPLIER) / PARTIE C - MESURES DE PROTECTION (FOURNISSEUR)**

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

11. a) Will the supplier be required to receive and store PROTECTED and/or CLASSIFIED information or assets on its site or premises?

Le fournisseur sera-t-il tenu de recevoir et d'entreposer sur place des renseignements ou des biens PROTÉGÉS et/ou CLASSIFIÉS?

 No    Yes  
Non   Oui

11. b) Will the supplier be required to safeguard COMSEC information or assets?

Le fournisseur sera-t-il tenu de protéger des renseignements ou des biens COMSEC?

 No    Yes  
Non   Oui

## PRODUCTION

11. c) Will the production (manufacture, and/or repair and/or modification) of PROTECTED and/or CLASSIFIED material or equipment occur at the supplier's site or premises?

Les installations du fournisseur serviront-elles à la production (fabrication et/ou réparation et/ou modification) de matériel PROTÉGÉ et/ou CLASSIFIÉ?

 No    Yes  
Non   Oui

## INFORMATION TECHNOLOGY (IT) MEDIA / SUPPORT RELATIF À LA TECHNOLOGIE DE L'INFORMATION (TI)

11. d) Will the supplier be required to use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data?

Le fournisseur sera-t-il tenu d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou des données PROTÉGÉS et/ou CLASSIFIÉS?

 No    Yes  
Non   Oui

11. e) Will there be an electronic link between the supplier's IT systems and the government department or agency?

Disposera-t-on d'un lien électronique entre le système informatique du fournisseur et celui du ministère ou de l'agence gouvernementale?

 No    Yes  
Non   Oui

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Security Classification / Classification de sécurité

UNCLASSIFIED

**PART C - (continued) / PARTIE C - (suite)**

For users completing the form manually use the summary chart below to indicate the category(ies) and level(s) of safeguarding required at the supplier's site(s) or premises.

Les utilisateurs qui remplissent le formulaire manuellement doivent utiliser le tableau récapitulatif ci-dessous pour indiquer, pour chaque catégorie, les niveaux de sauvegarde requis aux installations du fournisseur.

For users completing the form online (via the Internet), the summary chart is automatically populated by your responses to previous questions.  
Dans le cas des utilisateurs qui remplissent le formulaire en ligne (par Internet), les réponses aux questions précédentes sont automatiquement saisies dans le tableau récapitulatif.

**SUMMARY CHART / TABLEAU RÉCAPITULATIF**

| Category<br>Catégorie  | PROTECTED<br>PROTÉGÉ |   |   | CLASSIFIED<br>CLASSIFIÉ      |        |                                 | NATO   |                      |                |   | COMSEC               |   |   |   |                              |        |                                 |
|--|----------------------|---|---|------------------------------|--------|---------------------------------|--|----------------------|----------------|---|----------------------|---|---|---|------------------------------|--------|---------------------------------|
|  | A                    | B | C | CONFIDENTIAL<br>CONFIDENTIEL | SECRET | TOP<br>SECRET<br>TRÈS<br>SECRET | NATO<br>RESTRICTED<br>NATO<br>DIFFUSION<br>RESTRÉNTE | NATO<br>CONFIDENTIAL | NATO<br>SECRET | COSMIC<br>TOP<br>SECRET<br>CONFIDENTIAL<br>TRÈS<br>SECRET | PROTECTED<br>PROTÉGÉ | A | B | C | CONFIDENTIAL<br>CONFIDENTIEL | SECRET | TOP<br>SECRET<br>TRÈS<br>SECRET |
| Information / Assets<br>Renseignements / Biens<br>Production |                      |   |   |                              |        |                                 |  |                      |                |   |                      |   |   |   |                              |        |                                 |
| IT Media /<br>Support TI<br>IT Média /<br>Support TI         |                      |   |   |                              |        |                                 |  |                      |                |   |                      |   |   |   |                              |        |                                 |
| Liens électroniques  |                      |   |   |                              |        |                                 |  |                      |                |   |                      |   |   |   |                              |        |                                 |

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED?

La description du travail visé par la présente LVERS est-elle de nature PROTEGEE et/ou CLASSIFIÉE?

 No Yes

Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".

Dans l'affirmative, classifier le présent formulaire en indiquant le niveau de sécurité dans la case intitulée  
« Classification de sécurité » au haut et au bas du formulaire.

12. b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED?

La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE?

 No Yes

Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments).

Dans l'affirmative, classifier le présent formulaire en indiquant le niveau de sécurité dans la case intitulée  
« Classification de sécurité » au haut et au bas du formulaire et indiquer qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).

## COMMON-PS-SRCL#19

Government of Canada  
Gouvernement du Canada

Contract Number / Numéro du contrat

47060-187626

Security Classification / Classification de sécurité  
UNCLASSIFIED**PART D - AUTHORIZATION / PARTIE D - AUTORISATION**

13. Organization Project Authority / Chargé de projet de l'organisme

|   |                                   |                                   |
|---|-----------------------------------|-----------------------------------|
| Name (print) - Nom (en lettres moulées) | Title - Titre                     | Signature                         |
| Louis Albert                            | Director ISPB                     |                                   |
| Telephone No. - N° de téléphone         | Facsimile No. - N° de télécopieur | E-mail address - Adresse courriel |
| 343-291-6007                            |                                   | Louis.MA@tbs-sct.gc.ca            |
| Date                                    |                                   |                                   |
| Feb 5, 2018                             |                                   |                                   |

14. Organization Security Authority / Responsable de la sécurité de l'organisme

|   |                                   |                                   |
|---|-----------------------------------|-----------------------------------|
| Name (print) - Nom (en lettres moulées) | Title - Titre                     | Signature                         |
| AHMED SALAMI                            | Manager, HSC Security             |                                   |
| Telephone No. - N° de téléphone         | Facsimile No. - N° de télécopieur | E-mail address - Adresse courriel |
| 343-291-6001                            |                                   | ahmed.sch@tbs-sct.gc.ca           |
| Date                                    |                                   |                                   |
| 2018-02-06                              |                                   |                                   |

15. Are there additional instructions (e.g. Security Guide, Security Classification Guide) attached?

Des instructions supplémentaires (p. ex. Guide de sécurité, Guide de classification de la sécurité) sont-elles jointes?

 No  
 Non       Yes  
 Oui

16. Procurement Officer / Agent d'approvisionnement

|   |                                   |                                   |
|---|-----------------------------------|-----------------------------------|
| Name (print) - Nom (en lettres moulées)   | Title - Titre                     | Signature                         |
| Francis Lapalme   | Supply Specialist                 |                                   |
| Telephone No. - N° de téléphone   | Facsimile No. - N° de télécopieur | E-mail address - Adresse courriel |
| 613-858-9912  |                                   | francis.lapalme@tpsc-pwgsc.gc.ca  |
| Date  |                                   |                                   |
| April 10, 2018  |                                   |                                   |
| Digitally signed by Lapalme, Francis<br>Date: 2018.08.29 11:29:54 -04'00'   |                                   |                                   |
| Telephone No. - N° de téléphone   | Facsimile No. - N° de télécopieur | E-mail address - Adresse courriel |
|   |                                   |                                   |
| Signature   |                                   |                                   |
| Saumur, Jacques O   |                                   |                                   |
| Digitally signed by Saumur, Jacques O<br>DN: cn=CA,p=GC,c=CPWGSC,t=PSQC,ca=Saumur, Jacques O<br>Date: 2017.02.02 13:38:31 -05'00' |                                   |                                   |
| Telephone No. - N° de téléphone   | Facsimile No. - N° de télécopieur | E-mail address - Adresse courriel |
|   |                                   |                                   |

Jacques Saumur  
 Contract Security Officer  
 Contracts Security Division|Division des contrats sécurité /  
 Contract Security Program|Programme de sécurité des contrats /  
 Public Services and Procurement Canada|Services publics et Approvisionnement Canada  
 Jacques.Saumur@tpsc-pwgsc.gc.ca  
 Telephone | Téléphone 613-948-1732  
 Facsimile | Télécopieur 613-948-1712



**Purchasing Office - Bureau des achats:**  
Informatics Professional Services - EL  
Division/Services professionnels en informatique -  
division EL  
Terrasses de la Chaudière 4th Floor  
10 Wellington Street  
Gatineau  
Québec  
K1A 0S5

## CONTRACT AMENDMENT MODIFICATION AU CONTRAT

The referenced document is hereby amended: unless otherwise indicated, all other terms and conditions of the contract remain the same.

Ce document est par la présente modifié: sauf indication contraire, les modalités du contrat demeurent les mêmes.

The Vendor/Firm hereby accepts/acknowledges this amendment.

Le fournisseur/entrepreneur accepte la présente modification/en accusé réception.

Signature Date  
Name, title of person authorized to sign (type or print)  
Nom et titre du signataire autorisé (taper ou imprimer)

Return signed copy forthwith  
Prière de retourner une copie dûment signée immédiatement

### Comments - Commentaires

#### Vendor/Firm Name and Address

#### Raison sociale et adresse du fournisseur/de l'entrepreneur

856204904PG0001  
TUNDRA TECHNICAL SOLUTIONS INC.  
1 Eglinton Ave East, Suite 705  
Toronto  
Ontario  
M4P3A1  
Canada  
Operating as: Tundra Technical Solutions

|   |   |
|---|---|
| <b>Title - Sujet</b><br>ITSSC (Workstream 2)  |   |
| <b>Contract No. - N° du contrat</b><br>47060-187626/003/EL  | <b>Amendment No. - N° Modif</b><br>001        |
| <b>Client Reference No. - N° de référence du client</b><br>1000337626   | <b>Date</b><br>2018-09-21                     |
| <b>Requisition Reference No. - N° de la demande</b><br>47060-187626   |   |
| <b>File No. - N° de dossier</b><br>632el.47060-187626   | <b>CCC No./N° CCC - FMS No./N° VME</b>        |
| <b>Financial Codes</b><br>Code(s) financier(s)  |   |
| <b>GST/HST</b><br><b>TPS/TVH</b>  |   |
| <b>F.O.B. - F.A.B.</b><br>Other - Autre Specified Herein - Précisé dans les présentes   |   |
| <b>GST/HST - TPS/TVH</b>  | <b>Duty - Droits</b>                          |
| See Herein - Voir ci-inclus   | See Herein - Voir ci-inclus                   |
| <b>Destination - of Goods, Services, and Construction:</b><br><b>Destination - des biens, services et construction:</b>                               |   |
| TECHNOLOGY /TECHNOLOGIE<br>NC REGION<br>Ottawa ON   |   |
| <b>Invoices - Original and two copies to be sent to:</b><br><b>Factures - Envoyer l'original et deux copies à:</b>                                    |   |
| TECHNOLOGY /TECHNOLOGIE<br>NC REGION<br>Ottawa ON   |   |
| <b>Address Enquiries to: - Adresser toutes questions à:</b><br>Lapalme, Francis   | <b>Buyer Id - Id de l'acheteur</b><br>632el   |
| <b>Telephone No. - N° de téléphone</b><br>(613) 858-9912 ( )  | <b>FAX No. - N° de FAX</b><br>( ) -           |
| <b>Increase (Decrease) - Augmentation (Diminution)</b><br>\$0.00  |   |
| <b>Revised estimated cost</b><br>Coût révisé estimatif<br>\$1,062,732.48  | <b>Currency Type - Genre de devise</b><br>CAD |
| <b>For the Minister - Pour le Ministre</b><br><b>Lapalme, Francis</b><br>Digitally signed by Lapalme,<br>Francis<br>Date: 2018.09.21 16:42:36 -04'00' |   |

Contract Number:  
47060-187626/003/EL

Amendment Number:  
001

Buyer ID:  
632EL

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## AMENDMENT 001

This amendment is issued to remove a clause that is not applicable to the contract.

---

1. At **Article 2. Task Authorization** of the Contract, amend as follows:

**DELETE clause b.** in its entirety.

---

***ALL OTHER TERMS AND CONDITIONS OF THE CONTRACT REMAIN UNCHANGED.***



**Purchasing Office - Bureau des achats:**  
Informatics Professional Services - EL  
Division/Services professionnels en informatique -  
division EL  
Terrasses de la Chaudière 4th Floor  
10 Wellington Street  
Gatineau  
Québec  
K1A 0S5

|   |  |
|---|--|
| <b>Title - Sujet</b><br>ITSSC (Workstream 2)                          |  |
| <b>Contract No. - N° du contrat</b><br>47060-187626/003/EL            | <b>Amendment No. - N° Modif</b><br>002 |
| <b>Client Reference No. - N° de référence du client</b><br>1000337626 | <b>Date</b><br>2020-05-06              |
| <b>Requisition Reference No. - N° de la demande</b><br>47060-187626   |  |
| <b>File No. - N° de dossier</b><br>636el.47060-187626                 | <b>CCC No./N° CCC - FMS No./N° VME</b> |
| <b>Financial Codes</b><br>Code(s) financier(s)                        | <b>GST/HST</b><br><b>TPS/TVH</b>       |

## CONTRACT AMENDMENT MODIFICATION AU CONTRAT

The referenced document is hereby amended: unless otherwise indicated, all other terms and conditions of the contract remain the same.

Ce document est par la présente modifié: sauf indication contraire, les modalités du contrat demeurent les mêmes.

The Vendor/Firm hereby accepts/acknowledges this amendment.

Le fournisseur/entrepreneur accepte la présente modification/en accusé réception.

*David McKernan*

Director of Public Sector

2020-05-06

Signature

Date

Name, title of person authorized to sign (type or print)  
Nom et titre du signataire autorisé (taper ou imprimer)

Return signed copy forthwith  
Prière de retourner une copie dûment signée immédiatement

### Comments - Commentaires

#### Vendor/Firm Name and Address

Raison sociale et adresse du  
fournisseur/de l'entrepreneur

856204904PG0001  
TUNDRA TECHNICAL SOLUTIONS INC.  
1 Eglinton Ave East, Suite 705  
Toronto  
Ontario  
M4P3A1  
Canada  
Operating as: Tundra Technical Solutions

#### Invoices - Original and two copies to be sent to:

Factures - Envoyer l'original et deux copies à:

TECHNOLOGY /TECHNOLOGIE  
NC REGION  
Ottawa ON

#### Address Enquiries to: - Adresser toutes questions à:

Chan, Anita

Buyer Id - Id de l'acheteur

636el

Telephone No. - N° de téléphone

(613) 858-9487 ( ) ( ) -

#### Increase (Decrease) - Augmentation (Diminution)

\$0.00

#### Revised estimated cost

Coût révisé estimatif

\$1,062,732.48

Currency Type - Genre de devise

CAD

For the Minister - Pour le Ministre

**Morin, Sylvie**

Digitally signed by: Morin, Sylvie

DN: CN = Morin, Sylvie C = CA O = GC

OU = PWGSC-TPSGC

Date: 2020.05.06 10:34:46 -04'00'

Contract Number:  
47060-187626/003/EL

Amendment Number:  
002

Buyer ID:  
636EL

---

## AMENDMENT 002

This amendment is issued to:

- change the Contracting Authority of the Contract;
- change the Technical Authority of the Contract; and
- add the Evaluation Criteria for one Resource.

---

### 1. At Article 7. Authorities, amend as follows:

**DELETE clause (a) Contracting Authority** in its entirety.

**INSERT:**

#### **(a) Contracting Authority**

The Contracting Authority for the Contract is:

Name: Anita S Chan  
Title: Intern Officer  
Organization: Public Works and Government Services Canada  
Acquisitions Branch  
Directorate: Professional Services Procurement Directorate  
Address: 10 Wellington St, Gatineau, (Québec)  
Telephone: (613) 858-9487  
E-mail address: [anita.chan2@tpsgc-pwgsc.gc.ca](mailto:anita.chan2@tpsgc-pwgsc.gc.ca)

The Contracting Authority is responsible for the management of the Contract and any changes to the Contract must be authorized in writing by the Contracting Authority. The Contractor must not perform work in excess of or outside the scope of the Contract based on verbal or written requests or instructions from anybody other than the Contracting Authority

---

### 2. At Article 7. Authorities, amend as follows:

**DELETE clause (b) Technical Authority** in its entirety.

**INSERT:**

#### **(b) Technical Authority**

The Technical Authority for the Contract is:

Name: Daphne Bond  
Title: Director, Analytics Solution Division  
Organization: Canada Border Services Agency  
Address: 333 North River Road, Tower A, Ottawa, ON K1A 0L8  
Telephone: 343-291-7370  
E-mail address: [daphne.bond@cbsa-asfc.gc.ca](mailto:daphne.bond@cbsa-asfc.gc.ca)

In her absence, the Technical Authority is:

Name: Ali Sheikh

|                     |                   |           |
|---------------------|-------------------|-----------|
| Contract Number:    | Amendment Number: | Buyer ID: |
| 47060-187626/003/EL | 002               | 636EL     |

---

Title: A/Manager, Strategic Policy Branch  
Organization: Canada Border Services Agency  
Address: 333 North River Road, Tower A, Ottawa, ON K1A 0L8  
Telephone: 343-291-5590  
Mobile: 613-716-5942  
E-mail address: [ali.sheikh@cbsa-asfc.gc.ca](mailto:ali.sheikh@cbsa-asfc.gc.ca)

The Technical Authority is the representative of the department or agency for whom the Work is being carried out under the Contract and is responsible for all matters concerning the technical content of the Work under the Contract. Technical matters may be discussed with the Technical Authority; however, the Technical Authority has no authority to authorize changes to the scope of the Work. Changes to the scope of the Work can only be made through a contract amendment issued by the Contracting Authority.

---

**3. In Appendix C to Annex A – Resources Assessment Criteria and Response Table, amend as follows:**

**INSERT:**

Contract Number:  
47060-187626/003/EL

Amendment Number:  
002

Buyer ID:  
636EL

## GIS Application Architect

TA #: \_\_\_\_\_

Contractor Name: \_\_\_\_\_

Proposed Resource Name: \_\_\_\_\_

Level:

- 2
- 3

### 1. RESOURCE TECHNOLOGY AND CERTIFICATION REQUIREMENTS

#### RESOURCE ESSENTIAL (E) DESIRABLE (D) TECHNOLOGY REQUIREMENT(S)

- GIS Product Suites
- MS Office Suite (Word, Excel, PowerPoint)
- MS Visio
  
- ESRI /ArcGIS Suite

#### RESOURCE DESIRABLE (D) CERTIFICATION REQUIREMENT(S)

- ESRI Enterprise System Design

### 2. RESOURCE MANDATORY CRITERIA

| ID | Mandatory Criteria | Bidder's response |   |
|----|--------------------|-------------------|---|
|    |                    | Met<br>(Yes/No)   | Demonstrated Experience<br>(Bidders to insert cross reference<br>to assigned resource project<br>reference number(s)) |
|    |                    |                   |   |

Contract Number:  
47060-187626/003/EL

Amendment Number:  
002

Buyer ID:  
636EL

|    |  |  |  |
|----|--|--|--|
| M1 | <p>The Contractor must demonstrate that the proposed resource has the minimum number of years of experience specified below:</p> <p><b>For Level 2 resource categories the requirement is as follows:</b> The resource must have 5 years experience within the past 7 years of the draft TA issuance date executing at least 60% of the tasks enumerated at Article 3 of Annex A for the specific resource category identified in the draft TA.</p> <p><b>For Level 3 resource categories the requirement is as follows:</b> The resource must have 10 years experience within the past 15 years of the draft TA issuance date executing at least 60% of the tasks enumerated at Article 3 of Annex A for the specific resource category identified in the draft TA.</p> |  |  |
| M2 | <p>The Contractor must demonstrate that the proposed resource's experience submitted under M1 includes the minimum number of months of experience specified below:</p> <p><b>For Level 2 resource categories the requirement is as follows:</b> The resource must have 2 years experience within the past 4 years of the draft TA issuance date using the technology(ies) identified as Essential (E).</p> <p><b>For Level 3 resource categories the requirement is as follows:</b> The resource must have 4 years experience within the past 8 years of the draft TA issuance date using the technology(ies) identified as Essential (E).</p>   |  |  |

Contract Number:  
47060-187626/003/ELAmendment Number:  
002Buyer ID:  
636EL**3. RESOURCE POINT-RATED CRITERIA**

| ID | Applicable or not?<br>(Client to insert "X" in boxes for the criteria that apply) | Point Rated Criteria   | Max Points      | Point Allocation Grid  | Bidder's response   |
|----|---|--|-----------------|--|---|
|    |   |  |                 |  | Demonstrated Experience<br>(Bidders to insert cross reference to assigned resource project reference number(s)) |
| R1 | <input type="checkbox"/>  | Points will be awarded for experience over and above the required in M1. | 10              | <p><b>For Level 2 Resource:</b><br/>5+ to 6 years = 5 points<br/>6+ years = 10 points</p> <p><b>For Level 3 Resource:</b><br/>10+ to 11 years = 2 points<br/>11+ to 12 years = 4 points<br/>12+ to 13 years = 6 points<br/>13 + to 14 years = 8 points<br/>14+ years = 10 points</p> |   |
| R2 | <input type="checkbox"/>  | Points will be awarded for experience over and above the required in M2. | 10 per element* | <p><b>For each Element:</b></p> <p><b>For Level 2 Resource:</b><br/>2+ to 3 years = 5 points<br/>3+ years = 10 points</p> <p><b>For Level 3 Resource:</b><br/>4+ to 5 years =3 points<br/>5+ to 6 years = 7 points<br/>6+ years = 10 points</p>                                      |   |

Contract Number:  
47060-187626/003/ELAmendment Number:  
002Buyer ID:  
636EL

|    |                          |  |                        |  |
|----|--------------------------|--|------------------------|--|
|    |                          |  |                        |  |
| R3 | <input type="checkbox"/> | The Contractor should demonstrate that the proposed resource has experience in each of the Technology (Element) identified as Desirable ("D"). | <b>10 per element*</b> | <b>For each Element:</b><br>0 to 1 year = 0 points<br>1+ to 2 years = 2 points<br>2+ to 3 years = 4 points<br>3+ to 4 years = 6 points<br>4+ to 5 years = 8 points<br>5+ years = 10 points |
| R4 | <input type="checkbox"/> | The Contractor should demonstrate that the proposed resource holds the Certification(s) (Element) identified as Desirable ("D").               | <b>10 per element*</b> | The proposed resource is a holder of the certification = 10 points   |

\*Evaluation Weights (for R1 to R4) are identified at time of issuance of a draft TA and accompanies each TA:

#### 4. EVALUATION GRID AND WEIGHTS

| ID |  | Max Points | Points Achieved by Contractor (A) | Evaluation Weight (B)<br><i>(to be completed at tasking time)</i> | Weighted Result (A x B) |
|----|--|------------|-----------------------------------|---|-------------------------|
| R1 |  | 10         |                                   |   | 0                       |
| R2 | <i>(to be completed at tasking time)</i> |            |                                   |   |                         |
|    | Element 1                                | 10         |                                   |   | 0                       |
|    |  | Element 2  | 10                                |   | 0                       |

Contract Number:  
47060-187626/003/ELAmendment Number:  
002Buyer ID:  
636EL

|   |  |    |    |  |    |
|---|--|----|----|--|----|
|   | Etc.                                     | 10 |    |  | 0  |
| R3                                      | <i>(to be completed at tasking time)</i> |    |    |  |    |
|   | Element 1                                | 10 |    |  | 0  |
|   | Etc.                                     | 10 |    |  | 0  |
| R4                                      | <i>(to be completed at tasking time)</i> |    |    |  |    |
|   | Element 1                                | 10 |    |  | 0  |
|   | Etc.                                     | 10 |    |  | 0  |
| Total Weight <i>(must equal 100%)</i> : |  |    | 0% |  |    |
| Total Score**:                          |  |    |    |  | 0% |

\*\*Each proposed resource must meet the minimum pass mark of 70% to be deemed responsive.

**ALL OTHER TERMS AND CONDITIONS OF THE CONTRACT REMAIN UNCHANGED.**